TOURISM DEVELOPMENT IN ONTARIO:
A FRAMEWORK FOR OPPORTUNITY

Balmer, Crapo & Associates, Inc.

RECREATION/TOURISM RESEARCH, PLANNING & MANAGEMENT

TOURISM DEVELOPMENT IN ONTARIO:
A FRAMEWORK FOR OPPORTUNITY

Prepared for

Ministry of Industry and Tourism
Province of Ontario
Queen's Park
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by

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SUMMARY

The tourism industry in the Province of Ontario is a powerful social and economic force. Direct employment is about 165,000 persons and revenues totalled about $2.6 billion in 1975, of which about $900 million represented flows from the United States and abroad.

One major tourism goal of the Ministry of Industry and Tourism is the stimulation of employment and income through planned development of tourism, consistent with an optimum balance between economic growth and the quality of life. The tourism industry is primarily in the hands of the private sector. Consequently, the Ministry's goals for tourism must be achieved in close collaboration with private industry. This study "A Framework for Opportunity" is intended to contribute to this collaboration and the achievement of the Ministry's goals by suggesting a private sector development framework for the next 5 - 10 years.

This is the first phase of a two phase process--it outlines a broad Province-wide strategy. The second phase will suggest detailed strategies for selected geographic areas with the specific objective of identifying investment opportunities in tourism, primarily for the private sector.

This study involved careful analysis of tourism resources, both natural and man-made (Chapter II), tourism markets (Chapter III), and tourism activities (Chapters III and IV). It considered both the current picture and possible future trends.

The results of this analysis strongly pointed to a development strategy for private business based upon Tourism Development Zones, linked by Touring Corridors and supported by a Tourism Hinterland (Chapter VI). The tourism development zones are geographic areas which offer good opportunities for private industry, while concentrating efficiently the necessary public investment in supporting facilities. The touring corridors which link the development zones should generally focus on investments catering to pass-through travellers (e.g., accommodation, food, auto services). The hinterland offers opportunities for more dispersed investment.

The specific locations of the seventeen zones, corridors, and hinterland are shown in Figure VI-4. This represents the expected picture over the next 5 to 10 years. A 25 year projection is shown in Figure VI-5. Over this longer

term, parts of the hinterland evolve into zones and new touring corridors will be created.

The broad planning guidelines and policies of the Province were reviewed in working toward this strategy. The strategy is consistent with these guidelines and policies (Chapter V).

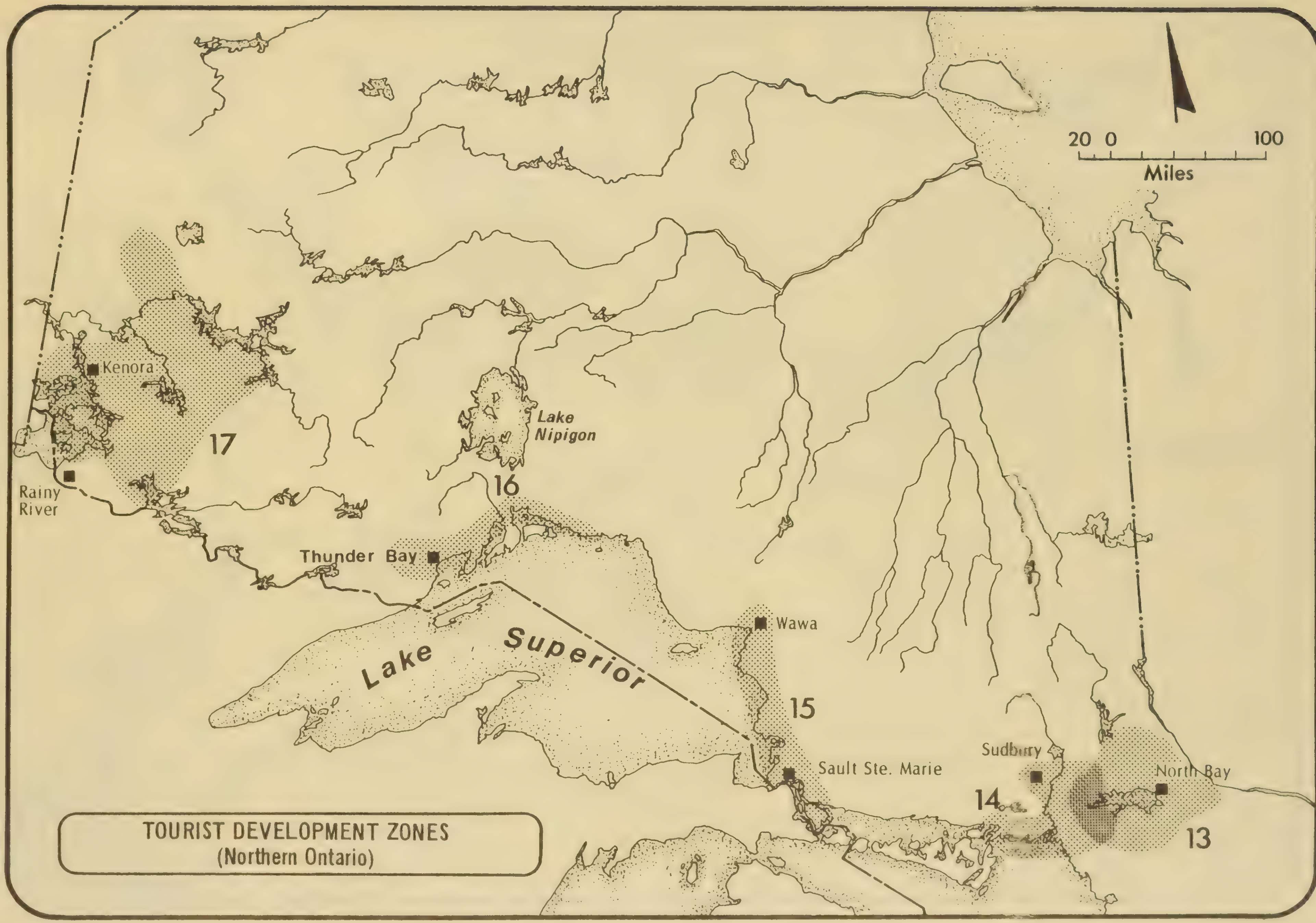
The zones were identified based on a set of criteria - both quantitative and qualitative - designed to identify areas with high current tourism activity and with significant potential for profitable growth for the private sector. The zones include the Province's principal natural and man-made tourism resources and serve the major share of the market demand. These zones have potential for further growth over the 5 to 10 year time horizon of this study.

Each zone was analyzed in terms of potential themes to guide development and in terms of a series of specific tourism activities which would be appropriate to that zone (Chapter VI). Each of these activities was ranked in terms of its potential for development in each zone. A body of statistical information is presented for each zone along with a short description and suggestions for future development.

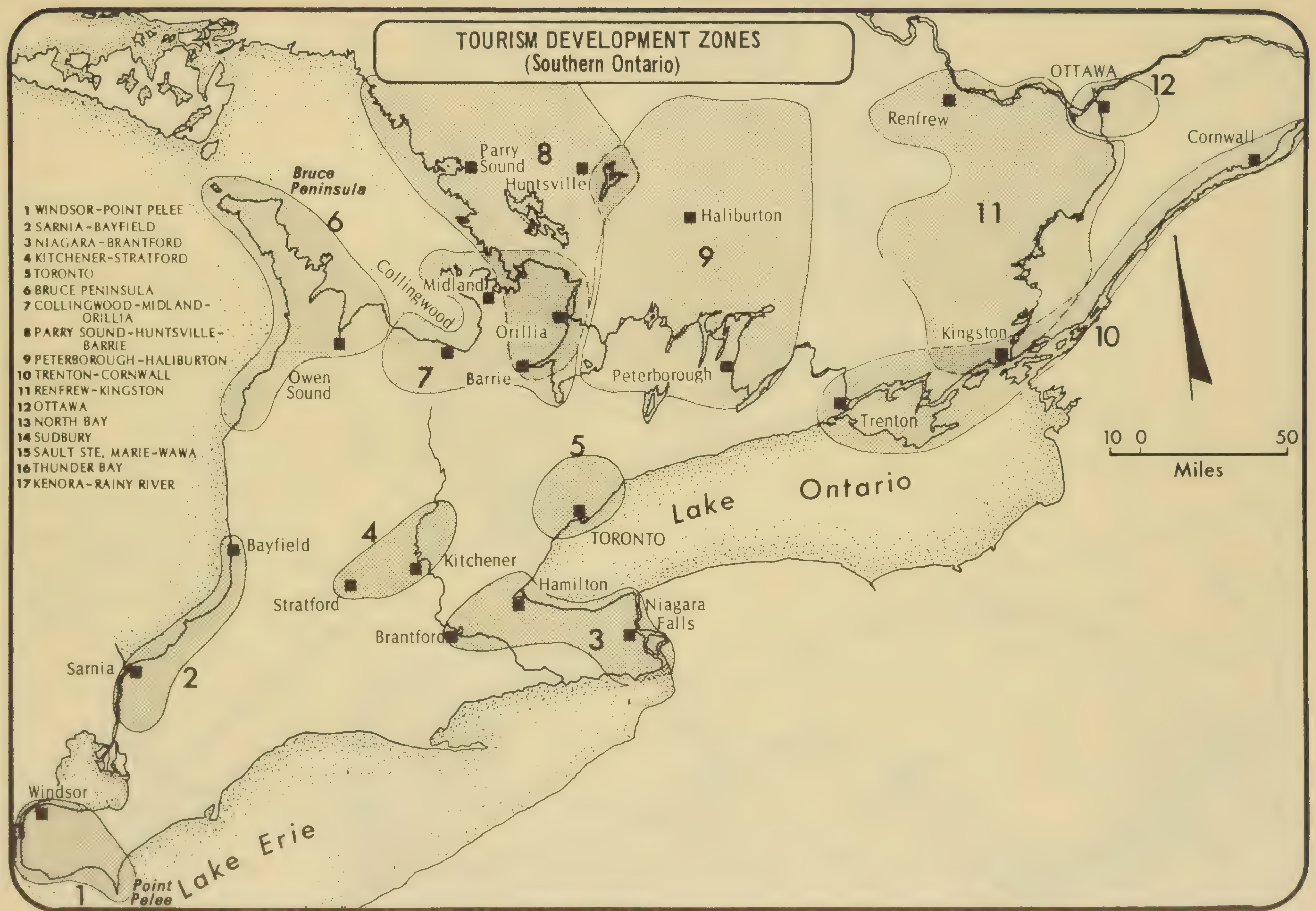
This study should assist tourism operators and interested investors by providing initial guidance concerning what tourism activities may be attractive and where they should be located. The investor will also know that the guidelines and suggestions in this study are consistent with the broad goals of the Province.

Implementing this strategy ultimately lies with the private sector. Encouragement should come from the Ministry of Industry and Tourism. It is recommended that the Ministry acquaint all those concerned and interested in tourism development with this Framework for Opportunity. The Travel and Trade Associations in the Tourism industry should play a role in disseminating this document and provide reaction to the Ministry. The Ministry's field staff should use this document in its daily contacts with private business interested in tourism opportunities. The Ministry should proceed without delay to the second phase - detailed development studies of individual development zones in order to identify specific opportunities for private investment.

The tourism industry is growing and changing. Therefore, this Framework for Opportunity will require periodic review and updating to reflect any broad changes in outlook, to reflect reaction from the private investor, and to reflect the experience gained from the first detailed studies of individual development zones.



TOURIST DEVELOPMENT ZONES
(Northern Ontario)


TOURISM DEVELOPMENT ZONES
(Southern Ontario)
1 WINDSOR-POINT PELEE
2 SARNIA-BAYFIELD
3 NIAGARA-BRANTFORD
4 KITCHENER-STRATFORD
5 TORONTO
6 BRUCE PENINSULA
7 COLLINGWOOD-MIDLAND-ORILLIA
8 PARRY SOUND-HUNTSVILLE-BARRIE
9 PETERBOROUGH-HALIBURTON
10 TRENTON-CORNWALL
11 RENFREW-KINGSTON
12 OTTAWA
13 NORTH BAY
14 SUDBURY
15 SAULT STE. MARIE-WAWA
16 THUNDER BAY
17 KENORA-RAINY RIVER
Bruce Peninsula
Owen Sound
Collingwood
Midland
Orillia
Barrie
Parry Sound
Huntsville
Haliburton
Peterborough
Renfrew
OTTAWA
Cornwall
Kingston
Trenton
TORONTO
Lake Ontario
Bayfield
Kitchener
Stratford
Hamilton
Niagara Falls
Brantford
Sarnia
Windsor
Point Pelee
Lake Erie
1
2
3
4
5
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7
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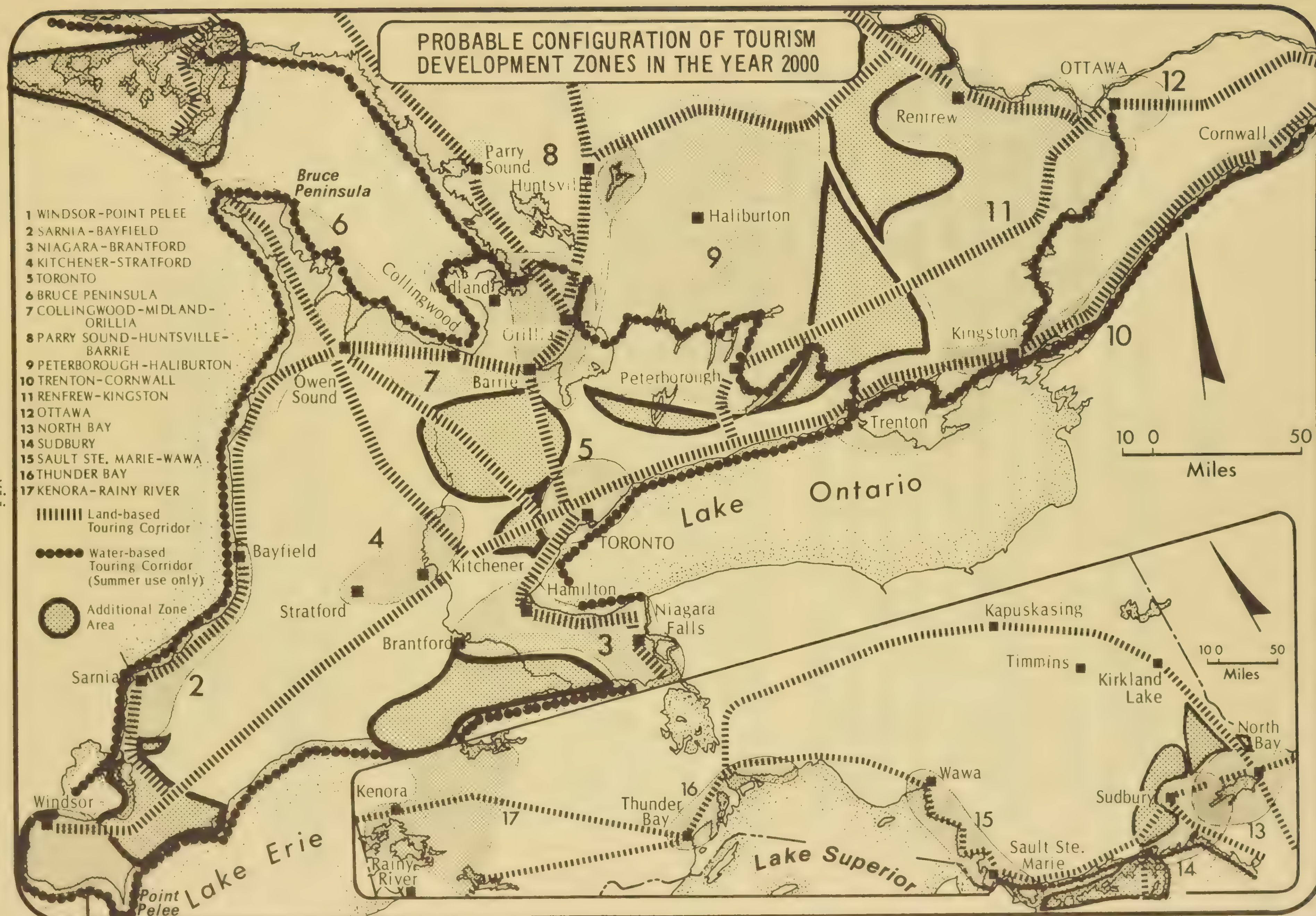
11
12
10 0 50
Miles

Fig. VI-3



PROBABLE CONFIGURATION OF TOURISM
DEVELOPMENT ZONES IN THE YEAR 2000
1 WINDSOR-POINT PELEE
2 SARNIA-BAYFIELD
3 NIAGARA-BRANTFORD
4 KITCHENER-STRATFORD
5 TORONTO
6 BRUCE PENINSULA
7 COLLINGWOOD-MIDLAND-ORILLIA
8 PARRY SOUND-HUNTSVILLE-BARRIE
9 PETERBOROUGH-HALIBURTON
10 TRENTON-CORNWALL
11 RENFREW-KINGSTON
12 OTTAWA
13 NORTH BAY
14 SUDBURY
15 SAULT STE. MARIE-WAWA
16 THUNDER BAY
17 KENORA-RAINY RIVER
Land-based Touring Corridor
Water-based Touring Corridor (Summer use only)
Additional Zone Area
OTTAWA
Renfrew
Cornwall
Parry Sound
Bruce Peninsula
Haliburton
Midland
Collingwood
Orillia
Kingston
Barrie
Owen Sound
Peterborough
Trenton
Lake Ontario
TORONTO
Kitchener
Bayfield
Hamilton
Stratford
Niagara Falls
Brantford
Sarnia
Windsor
Point Pelee
Lake Erie
10 0 50
Miles
Kapuskasing
Timmins
Kirkland Lake
100 50
Miles
North Bay
Wawa
Sudbury
Kenora
Thunder Bay
Sault Ste. Marie
Lake Superior
Rainy River

Fig. VI-5

PREFACE

This study was commissioned by the Ontario Ministry of Industry and Tourism in December 1975. The purpose was to provide a Provincial overview for tourism development in the Province for the next five to ten years, with emphasis on the private commercial sector.

The preparation of plans of this scale normally require the cooperation and assistance of several agencies and individuals. In this case, the dependence upon other professionals and organizations was amplified: the short time frame available to complete the plan, combined with the necessity of diverse input due to the nature of tourism development, placed heavy external demands for information and interpretations. The response was exemplary - and sincere thanks are extended to all who helped in the completion of this study.

Special mention must be made of the cooperation and assistance provided by the Tourism Division, Ministry of Industry and Tourism. All three Branches (Tourism Development, Tourism Research, and Tourism Marketing) made the expertise and experience of their staff available.

An Advisory Committee of representatives from provincial ministries provided direction to the study and acted as ministerial liaisons. Members included:

.Ministry of Natural Resources
.Ministry of Treasury, Economics and Intergovernmental Affairs
.Ministry of Culture and Recreation
.Ministry of Transportation and Communication
.Ministry of Housing
.Ministry of Environment

The Canadian Government Office of Tourism provided assistance as a member of the Advisory Committee and also in the form of partial financial support.

Other organizations helping complete the study were:

<u>Area Offices, Small Business Operations Division,
Ministry of Industry and Tourism</u>

Locations - Thunder Bay, Sudbury, Ottawa, Toronto, Kitchener, London

Federal Agencies

.Department of Indian and Northern Affairs

.Heritage Canada

Ontario Travel Associations

Trade Associations

.Tourism Ontario

.Northern Ontario Tourist Outfitters Association

.Association of Tourist Resorts of Ontario

.Ontario Hotel and Motel Association

.Ontario Motel Association

.Ontario Restaurant Association

.Ontario Ski Resort Association

.Ontario Ski Council

.The Ontario Chamber of Commerce

.Travel Industry Association of Canada

Tour Operators

.Gray Coach

.Voyageur - Colonial

.Horizon Holidays

.Sunflight - Suntours

Thanks must also be extended to the interministerial Tourism and Outdoor Recreation Planning Study (TORPS) Committee for use of information provided by the Ontario Recreation Survey (ORS) and the Outdoor Recreation Supply Inventory (ORSI).

Definitions

The reader will frequently encounter two terms throughout this document. It is worthwhile defining them clearly at the outset.

Tourist

"Tourist shall mean any Ontario resident travelling in excess of 25 miles from his home for any purpose other than commuting to work, and any non-resident (other province, U.S.A., other foreign) who enters Ontario for any purpose other than commuting to work."

It is significant to note that this definition includes much more than just the 'pleasure traveller/tourist'. Business travel beyond 25 miles and all out of province visitors are covered by this definition. It is clearly recognized that the characteristics of the tourist vary widely, depending on origin and trip purpose. This is not overlooked in this study.

Tourism Plant

The Tourism Plant can be divided into six general categories:

1. Activity-related--servicing specific recreation/tourism activities or combinations of activities (e.g., golf course, swimming beach, shops;
2. Food Services--from fast food service through to gourmet restaurants;
3. Accommodation--from campgrounds through to 'grand' hotels;
4. Transportation--including automobile, air, rail and boat facilities and supporting services;
5. Information (Reception/Direction);
6. Infrastructure and Industry Services--required to supply and maintain the 'direct' services outlined above (e.g., wholesalers).

Many tourist operations combine several of the 'plant' categories. For example, a resort combines accommodation, food services, activity-related 'plant' facilities (e.g., boats, docks, golf courses) and, sometimes, transportation (e.g., gasoline, limousines, aircraft).

CHAPTER I

INTRODUCTION

Continuing, careful tourism development is of vital importance to Ontario: it ensures that there will be interesting leisure opportunities available to a growing population; it is necessary in order to provide the wide variety of services and attractions demanded by travellers; it provides employment and income to Ontario residents; and it is necessary in order to improve the efficiency of the existing tourism facilities.

The enjoyment provided by pleasure travel, coupled with the travel required for business and personal reasons, results in a large and expanding travelling population. Over 94,000,000 person-visits occurred in Ontario in 1973, 64 percent by Ontario residents, 25 percent from the United States, 10 percent by residents from other Canadian provinces and 1 percent by overseas visitors. Tourism is a significant economic activity. It is estimated that tourists in Ontario spent $2.6 billion in 1975, purchasing a wide variety of goods and services. Direct employment in tourism is about 165,000 (1975).

Tourism development is the process of <u>increasing</u> the number and variety of opportunities available to travellers, while continuing to <u>improve</u> the quality of the tourism experience. Tourism development is a careful mix of preservation, upgrading and addition. <u>Preservation</u> because imprudent additions might alter the feature or landscape so that it no longer provides the attraction. <u>Upgrading</u> because our current tourism 'plant' is inadequate in some areas. <u>Addition</u> because of the increasing usage pressures by an increasing population, both domestic and world-wide, and the need to increase employment and income through tourism development in Ontario.

The desirability of a structured approach to tourism development in Ontario has prompted the Ministry of Industry and Tourism to undertake this Provincial framework. The purpose is to provide guidance concerning potentially profitable investment opportunities which are in harmony with the Province's broad social goals.

This framework is therefore oriented toward guiding prudent tourism investment by the private sector. It was formulated within the broad goals of the Provincial government, and was designed to further the goal relating

to tourism of the Ministry of Industry and Tourism: "To stimulate employment, income and economic development through the systematic improvement, development and marketing of Ontario's tourism industry".

The specific goals and objectives of tourism development are:

MORE

GOAL 1: To increase the volume and diversity of tourism opportunities throughout Ontario.

Objective 1-1: To develop a system of attractions and events of Provincial and regional significance.

Objective 1-2: To provide traveller support services (accommodation, food, transportation, information) in response to existing and projected consumption patterns.

Objective 1-3: To ensure the existence of an effective and efficient infrastructure to complement Provincial tourism resources.

BETTER

GOAL 2: To increase the quality of the tourism experience in Ontario

Objective 2-1: To encourage orderly growth and increased efficiency within the tourism industry.

Objective 2-2: To assist in upgrading the existing Tourism plant.

Objective 2-3: To encourage integration of supply components to better satisfy tourist requirements.

This study will aid in accomplishing both goals by providing a framework for tourism development/investment which identifies:

1. Where development should occur--geographic zones are identified which have good potential for development.

2. What opportunities should be developed--tourist activities are identified which have potential for development.

3. How development should take place--development guidelines are presented for the private and public sectors.

1. Organization

This project was conducted in six major steps. The first step, (Chapter II) examined the resource components affecting the supply of tourist opportunities available now and in the future.

The second step (Chapter III) analyzed the tourist market--Who are consuming tourist opportunities? Where do they live? How often do they visit? What do they do in Ontario? How much do they spend, and on what? This analysis reviewed both current travel patterns and probable future conditions.

The third step (Chapter IV) was a detailed review of major tourist activities. This step provided direction as to which activities offer the best opportunities for investment.

The fourth step (Chapter V) outlined a series of general development guidelines, including those responding to major Provincial planning policies. Possible impacts of tourism development, together with problems of diversification and seasonality, are discussed and implications for tourism development are outlined.

The fifth step (Chapter VI) describes the 'zone' approach to tourism development. This is based on the conclusions and guidelines presented in the previous chapters. Seventeen tourism development zones are identified. Development themes and activities appropriate to each zone are identified. The rationale and criteria for selecting the 'zones' are presented, together with a list of several possible uses of the zone approach by planners/developers. The relationship of zones to the area outside zones, and the connecting corridors between zones, are discussed. A summary of current tourist services, travel patterns, problems and suggestions for future development is then presented for each zone.

The final chapter (VII) suggests means to implement the suggestions in this study.

2. The Next Step After This Study

This is a Provincial overview and is general in its approach. It sets out broad guidelines for development, suggests zones with good investment opportunities, and identifies the types of activities which merit closer study in each zone. This should be useful and helpful to all those concerned with

the industry. However, it is beyond the scope of this overview to focus on or analyze specific opportunities. That is the task of the next phase. This succeeding phase will involve careful and detailed development studies of the identified zones. A critical objective of these zone studies will be to identify <u>specific</u> investment opportunities for the public sector, but especially for the private sector.

CHAPTER II

TOURISM RESOURCE COMPONENTS OF PROVINCIAL SIGNIFICANCE

A. Introduction

The purpose of this chapter is to evaluate the resource base of the Province that is relevant to tourism. This is part of the process of identifying:

(1) areas of the Province that are best suited for tourism development and

(2) recreation/tourism activities most appropriate for development in those areas.

The tourism resource components are discussed under the following headings:

1. natural features
2. attractions and events (including historic and ethnic features)
3. accommodation
4. information services
5. transportation
6. service centres, and
7. population/labour supply

No one component is dominant or singularly most important to the extent that all others are dependent on it; in fact, in most instances, the character of all components and the interrelationships among them must be considered when attempting to understand tourism or plan for tourism development.

Each component must be examined within the following framework:

1. importance to tourism;
2. existing supply (quantity, quality, distribution, supplier);
3. existing use (who is using, how many, where, when), and,
4. future trends (capacity of existing component to supply, growing and changing demand, examination of surplus opportunities within the Province).

In this chapter, attention will focus on the highlights of each resource component, and on the future. More detailed information about each is contained in Appendix A.

B. Natural Features

This first component involves the complex interrelationship of a number of elements, including physiography (geology, soils, topography), water resources, vegetation, wildlife and climate. Natural features are important to tourism in a number of ways. For example;

1. as attractions - Niagara falls, autumn forest colours;
2. as the basis for resource-related activities - outdoor sports, vacation home development, and scenic viewing and driving; and
3. to provide a pleasing background landscape or atmosphere to enhance the experience sought by the tourist.

Natural features also offer constraints to recreation development. Sensitive environments cannot support intensive activities and must be used for extensive activities such as viewing.

Ontario's natural resource base is a major attraction for tourists. The large portion of the Province remaining as crown land (approximately 80%) provides large natural-appearing areas for viewing and as settings for other outdoor activities. Four major physiographic regions in the Province provide a range of landscapes - from flat agricultural lands in the Southern Lowlands through the broken topography and rock outcrops of the Canadian Shield, to the flat lowlands of Hudson Bay (see Figure II-1). The distribution of forest cover, combined with the abundance of lakes and rivers, creates vast scenic landscapes that are varied and attractive.

The diversity and number of water resources in the Province are difficult to match anywhere in the world: Hudson Bay and James Bay, the Great Lakes, other large inland lakes (e.g., Simcoe, Nipissing, Lake of the Woods), hundreds of thousands of smaller inland lakes, rivers with a seemingly infinite variety of shorelines and flow characteristics, and major canal systems are available for tourist use. The majority of these waters are high quality, although pollution from natural and man-made sources presents a problem in some.

Some landscape and water features are of international significance - Niagara Falls, the Great Lakes, and the Northern 'wilderness'. The Niagara-Iroquoia

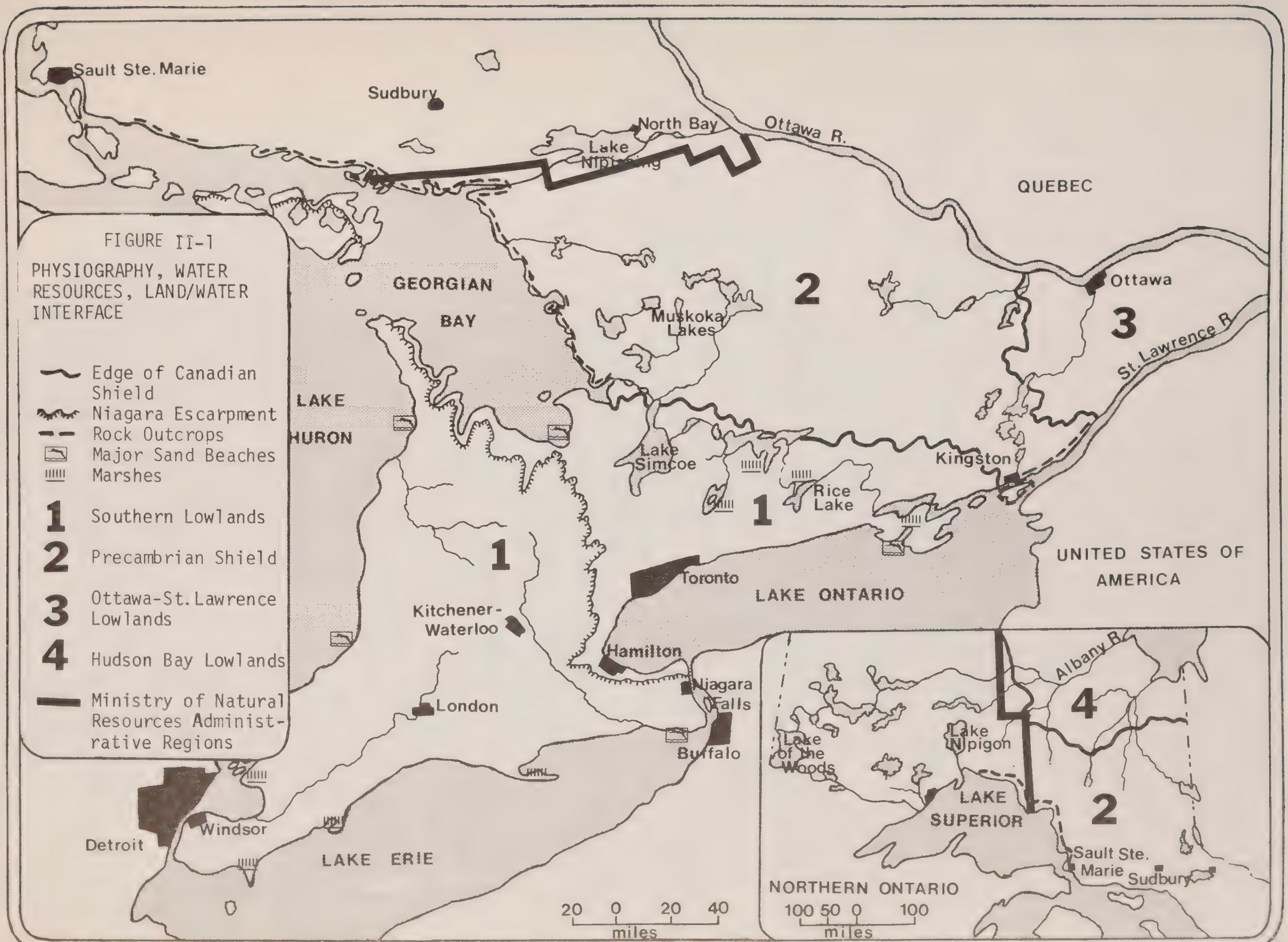


FIGURE II-1

PHYSIOGRAPHY, WATER RESOURCES, LAND/WATER INTERFACE

vacation area, in which Niagara Falls is the major attraction, had in excess of 16,000,000 person visits in 1973.

The entire Province experiences four distinct seasons, which are a major influence upon tourism and recreation patterns. Southern Ontario has a favourable cool, temperate sub-humid climate and is characterized by relatively long summers and mild winters. Northern Ontario, on the other hand, is classified as having a modified continental climate with shorter summers and longer, more severe winters. However, considerable variation in climate is experienced across these regions in response to such factors as the range in latitude, altitude, topography and proximity to the Great Lakes. Figure II-2 indicates variation in length of summer across the Province.

The abundance of wildlife in Ontario affords excellent viewing and hunting opportunities. Southern Ontario supports an impressive mixture of woodland, farmland and wetland wildlife. The largely forested Precambrian Shield area of Southern Ontario supports species such as moose, beaver, otter, mink, black bear and goshawk while the rich, warm agricultural area to the south supports a wider variety of species including raccoon, fox, eastern cottontail, white-tailed deer, wood ducks, gray and red squirrels and many species of songbirds and hawks. Fur bearers including beaver, otter, muskrat and mink are prevalent throughout Northern Ontario. Black bear and moose are also common, while deer and caribou occur in more restricted locations.

Hunting is very important to tourism, particularly because it primarily occurs during the 'shoulder' seasons of spring and fall. The most popular types of hunting for non-residents include moose, deer, bear and wildfowl, especially geese and duck. Deer hunting is concentrated in more southern portions of Ontario, as compared to moose hunting, which occurs mainly in the northern areas. The greatest numbers of non-resident bear hunters are found in Northern Ontario.

The variety of water bodies support several species of sports fish; yellow pickerel (walleye), largemouth and smallmouth bass, maskinonge, brook, brown, rainbow and lake trout, splake and whitefish. Although there is considerable fishing pressure in Southern Ontario, casual angling will continue to be an important component of most outdoor activity pleasure trips in the area. Northern Ontario receives less fishing pressure, although some areas (primarily those with road access) have been declared sensitive to angling. Those sensitive areas are primarily the lake trout lakes which are generally recognized to be the least fertile and most fragile systems to maintain.

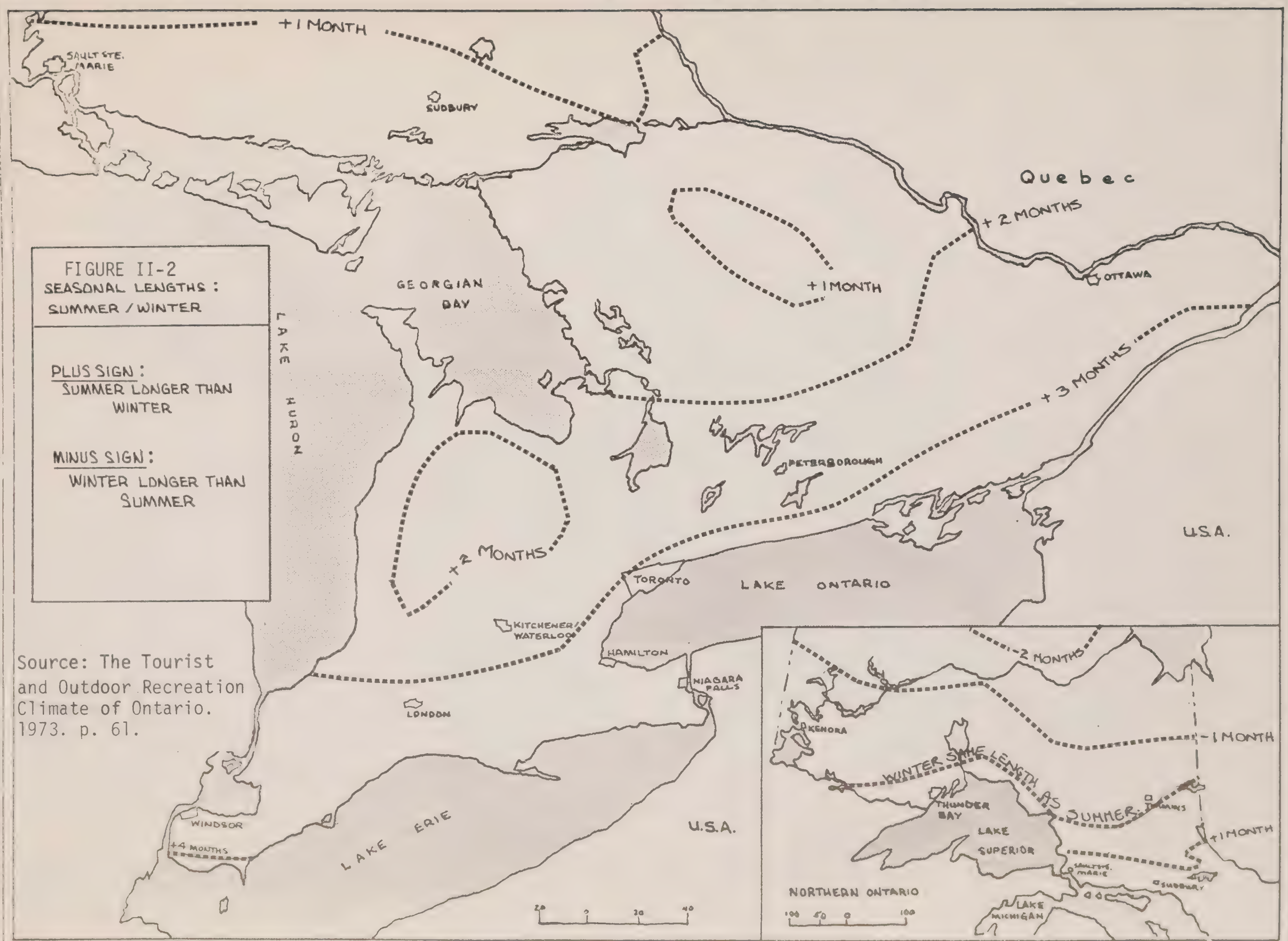


FIGURE II-2
SEASONAL LENGTHS: SUMMER / WINTER

Source: The Tourist and Outdoor Recreation Climate of Ontario. 1973. p. 61.

The demand for sport fishing is increasing in all parts of the Province. Information provided by the Sports Fishery Branch in 1976 indicated that by the year 2000 the only surplus opportunities in terms of angler days will be available in Northwestern Ontario and, to a lesser degree, in Northcentral and Southwestern Ontario. Virtually all of the surplus in the latter region must come from the Great Lakes, assuming that rehabilitation efforts are successful. In addition, the Northern region may have a surplus, depending on the status of currently unsurveyed lakes.

Public recreation areas play a significant role in the provision of outdoor recreation opportunities. Included as public recreation areas are three National Parks, 120 Provincial Parks and 288 conservation areas. Parks and conservation areas are utilized primarily during the summer months for activities such as camping, swimming, hiking, canoeing and viewing, among many others. In 1975 the total number of visitors to Provincial Parks was in excess of 11,000,000. A significant proportion of recreation and tourism occurs in an unorganized manner on crown lands in Northeastern and Northwestern Ontario.

1,338 commercial campgrounds, together with with numerous resorts and 242 fly-in hunting/fishing operations supply still other opportunities. In addition, there are well over 200,000 privately owned cottages located in the Province. Cottaging is a popular activity which occurs on private and, to a lesser extent, public lands. While this activity currently focuses on the summer and shoulder seasons, trends indicate that an increasing number of cottages are being utilized during the winter.

1. Capability for Outdoor Recreation Use

The Ministry of Natural Resources has classified Ontario in terms of capability for intensive and extensive outdoor recreation use, based upon the Canada Land Inventory.

a. Intensive Recreation Capability--Intensive use involves more permanent impact on the landscape. It includes beach activities (swimming, boating), concentrated cottaging, camping, lodging, year-round fishing, downhill skiing and viewing of key/unique landscapes. According to the Canada Land Inventory, areas ranked in the three highest classes are recognized as the most important for providing intensive opportunities.

Figure II-3 shows the areas of Ontario that have significant capability for intensive recreation.

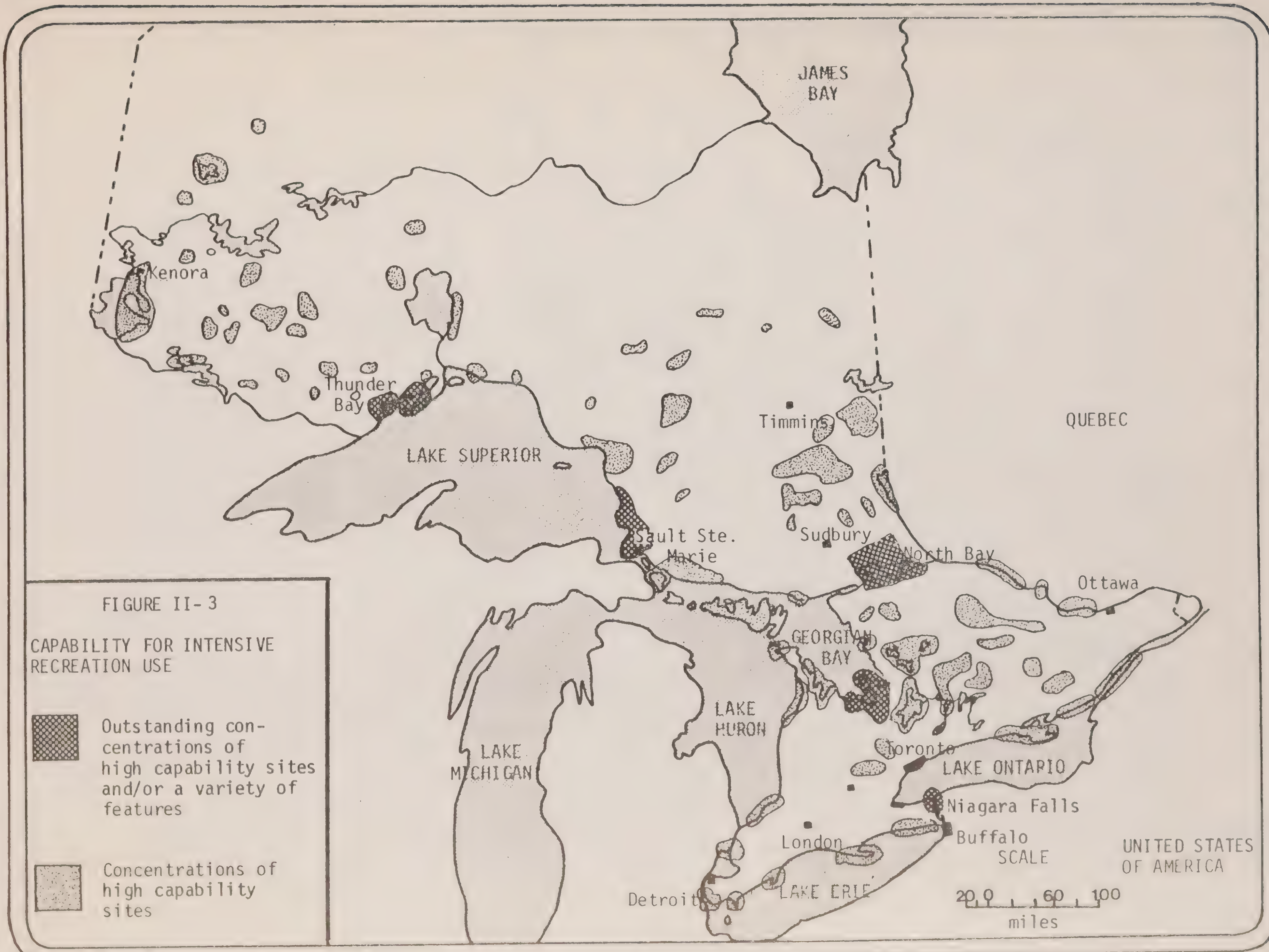


FIGURE II-3

CAPABILITY FOR INTENSIVE RECREATION USE

In Northeastern Ontario, the majority of locations are situated on the Precambrian Shield area, and the occurrence of water features within many locations indicates potential for water-oriented recreation. Of the 22 Northeastern Ontario areas shown on the map, only two contain sufficiently varied and high-ranking features to be classed as outstanding for intensive recreation--areas around Sault Ste. Marie and Lake Nipissing.

In Northwestern Ontario, all of the areas of outstanding and high quality natural features include water features. Their shoreline offers potential for recreation use for either lodging, cottaging or swimming. Only one area exhibits very high capability--near Thunder Bay.

Southern Ontario contains 26 areas rated as possessing high capability, with two more locations exhibiting outstanding capability for intensive recreation use--the Niagara Falls area and the southern portion of Georgian Bay.

b. Extensive Recreation Capability--Figure II-4 shows the large portion of Ontario that possesses 'high' and 'very high' extensive recreation capability ratings. The high quality of much of the Ontario landscape is a major asset to tourism development. Extensive recreation use includes activities such as hiking, automobile driving, fishing and hunting. The general quality of the landscape is an important factor in defining the predominantly linear patterns of land use for these activities. In the absence of a recognized rating system, the evaluation of extensive recreation capability relied on two factors, topographic classes and distribution patterns of water, since certain combinations of these make inherently attractive settings.

Most of the high capability area in Southern Ontario is located in the Northern and Eastern sections of the region.

Four major areas within Northeastern Ontario are shown as having very high capability for extensive-use recreation. The canoeing waters of the Temagami-Lady Evelyn Lake area are equal to the best of Quetico and Algonquin Park. The Killarney area offers canoeing and hiking opportunities that are not found anywhere else in the Province. The boating waters of the North Channel are reputed to be among the best in the world. Agawa Canyon is another feature of the region that has Provincial significance for extensive (as well as intensive) recreation use. Of special note is the generally low rating of the northern part of the region compared with the higher rating for the south. The lower

FIGURE II-4
CAPABILITY FOR EXTENSIVE RECREATION USE

rating is due to a lack of interesting topography coupled with a lack of attractive and usable water bodies.

The highest capability in the Northwestern region for extensive recreation is in the Southern portion, where a combination of extensive and varied water patterns and interesting topography exist together (e.g., Lake of the Woods, Rainy Lake). Towards the north, the capability becomes lower as the topography becomes less interesting; however, the smaller lakes and river patterns offer a type of recreation not found elsewhere in the region. An important aspect of extensive recreation use is hunting and fishing, and Northwestern Ontario offers varied opportunities for both uses. Of special note in this regard is the shoreline of Hudson and James Bay; here, the capability for goose hunting is rated very high and is considered to be of international significance.

C. Attractions and Events

Attractions and events are essential components of the tourism plant. They provide significant motivation for people to travel. Attractions, even if they are free of charge, have an economic impact in an area. Once visitors have been drawn to the area, the need arises for lodging, food services, entertainment and purchases of products, all of which bring money into the region.

Attractions and events also provide an excellent medium through which cultural values can be maintained, through developments such as Old Fort William and Upper Canada Village, and through activities like the Stratford and Shaw Festivals and Oktoberfest. Tables II-1 and II-2 and Figure II-5 show locations of the principal attractions and events. Less significant attractions and events are listed in Appendix A.

Cultural and artistic events (e.g., hobby and craft festivals, drama and music festivals, etc.) and historical attractions will gain in importance because of the educational, as well as recreational, experiences they afford. Historical and cultural themes already form the basis of major attractions and events in the Province; however, there is still significant potential for further development.

In certain areas of the Province there are ethnic concentrations that have retained their cultural identities, thereby creating in those areas a living environment or atmosphere which has tremendous appeal to persons outside of the region. The tangible evidence of such ethnic concentrations include architectural style, costumes, food, arts and crafts and even transportation modes. In many areas, attractions and events have been developed to package these cultural elements in order to encourage tourism.

Historical themes are oriented around activities and life styles rooted in the historical landscape. The historical themes must be portrayed in a tangible form to generate tourism. Physical manifestations of themes include historical landscape features and heritage institutions. The former include archeological sites, historical buildings, farms, roads, bridges, etc. The latter include museums. The large number of major attractions and events that already have been developed around these historical features gives evidence of their importance to tourism.

TABLE II-1

ATTRACTIONS OF PROVINCIAL SIGNIFICANCE BY ECONOMIC REGION

LOCATION	ATTRACTION	TYPE	SUPPLIER
MIDWESTERN ONTARIO			
Stratford	Stratford Festival . internationally acclaimed Stratford Theatre featuring unique and excellent productions each year	Cultural	Private, Non-Profit
Kitchener	Kitchener's Farmers Market . old world Amish and Mennonite farm produce	Agricultural/ Cultural/ Shopping	Municipal
NIAGARA			
Niagara Falls	Niagara Falls . natural attraction consisting of two cataracts (American Falls and Horseshoe Falls)	Recreational - scenic viewing	Niagara Parks Commission
Niagara-on-the-Lake	Shaw Festival . theatre presentations of plays written by George Bernard Shaw and his contemporaries	Cultural	Private, Non-Profit
	Fort George and Related Historical Sites	Historical	Parks Canada
Fort Erie	Old Fort Erie . typical early 19th Century fortification, containing relics of the War of 1812	Historical	Niagara Parks Commission
Rockton	African Lion Safari . 500 acre, open space wildlife preserve	Recreational - wildlife viewing	Commercial
GEORGIAN BAY			
Midland	Sainte Marie Among the Hurons . recreation of the first inland European community in Canada	Historical	Ministry of Culture and Recreation
Tobermory	Manitoulin Island Car Ferry	Recreational Travel	Ministry of Transportation and Communications
Penetanguishene	Naval and Military Establishments . reconstructed British Naval and Military establishments	Historical	Ministry of Culture and Recreation
CENTRAL ONTARIO			
Toronto	C.N. Tower . tallest self-supported structure in the world, revolving restaurant	Recreational - viewing, dining	Canadian National Railways
	Royal Ontario Museum . Ontario's most extensive museum	Cultural/ Historical	Ministry of Culture and Recreation

continued . . .

TABLE II-1, continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
CENTRAL ONTARIO			
Toronto, continued	Ontario Legislative Buildings	Historical	Province of Ontario
	Metro Toronto Zoo . 710 acres open zoo; animals inhabit a natural environment; 5,000 exhibits	Recreational - wildlife viewing - educational	Private, Non-Profit
	Casa Loma . castle built in 1914	Historical	
	City Hall . contains Nathan Phillips Square, "the city's courtyard"	Cultural/ Recreational - scenic viewing	Municipal
	O'Keefe Centre . 3,200 seat theatre, presenting a wide variety of popular stage shows, opera, ballet, concerts, etc.	Cultural	Municipal
	Ontario Place . 96 acre complex of man-made islands in Lake Ontario. Includes pavilions, cinesphere, Children's Village, domed theatre, etc.	Cultural/ Recreational - general	Ministry of Industry and Tourism
	Ontario Science Centre . more than 500 exhibits, many participatory	Recreational - educational	Ministry of Culture and Recreation
	Maple Leaf Gardens . large arena, for professional hockey, basketball, concerts, etc.	Recreational - sporting events	Commercial
	Black Creek Pioneer Village . reconstructed rural Ontario village, circa 1840-60	Historical	Metropolitan Toronto and Region Conservation Authority
	Art Gallery of Ontario and The Grange . second largest collection of Canadian Art The Grange was the first home of the gallery and is the oldest brick house still standing in Toronto	Cultural/ Historical	Ministry of Culture and Recreation
Kleinburg	McMichael Collection of Art . collection of paintings by the famous Group of Seven Canadian artists and their contemporaries	Cultural	
LAKE ONTARIO			
Mosport	Mosport Park . internationally rated auto race track; site of Canadian Grand Prix	Recreational - sporting event	Commercial
Peterborough	Peterborough Lift Locks . highest hydraulic lift lock in the world	Recreational - scenic viewing - travel	Parks Canada

continued . . .

TABLE II-1 continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
EASTERN ONTARIO			
Kingston	Old Fort Henry . extensive fortifications built in 1812; a museum of British and Canadian military history	Historical	St. Lawrence Parks Commission
Prescott	Fort Wellington . fortified post, built 150 years ago, and rebuilt in 1837	Historical	Parks Canada
Morrisburg	Upper Canada Village . showpiece of Canadiana circa 1800	Historical	St. Lawrence Parks Commission
Ottawa	Parliament Buildings . seat of Canadian government	Historical	Federal Government
	National Arts Centre . 2,300 seat opera house, 800 seat theatre, 300 seat studio.	Cultural	Federal Government
	National Gallery of Canada . a variety of art pieces on permanent display; includes a comprehensive collection of Canadian paintings and drawings	Cultural	Federal Government
	National Museum of Man and National Museum of Natural Sciences . relate the history of man to his natural environment	Cultural/ Educational	Federal Government
	National Museum of Science and Technology . history, principles and applications of science	Educational	Federal Government
	Royal Canadian Mint . production of Canadian currency	Historical	Federal Government
	National Aeronautical Collection . history of aviation in Canada	Historical	Federal Government
	Canadian War Museum . Canada's military history	Historical	Federal Government
	Changing of the Guard	Recreational - viewing	Federal Government
NORTHWESTERN ONTARIO			
Thunder Bay	Fort William . reconstruction of old trading post	Historical	Ministry of Culture and Recreation
	Big Thunder Ski Jump . international class jumping facility	Recreational	Thunder Bay Ski Jumps Ltd.

continued . . .

TABLE II-1 , continued

LOCATION	ATTRACTION	TYPE	SUPPLIER
NORTHEASTERN ONTARIO			
Sault Ste. Marie	Agawa Canyon Excursions . one day train tours, in summer and winter, in Algoma Central Country	Recreational - travel - scenic viewing	Algoma Central Railway
Cochrane	Polar Bear Express . day long rail ride from Cochrane to Moosonee	Recreational - travel - scenic viewing	Ontario Northland Railway
St. Joseph Island	Fort St. Joseph . 18th Century British Fort, situated in a 700 acre national park	Historical/ Recreational - general	Parks Canada

TABLE II-2

EVENTS OF PROVINCIAL SIGNIFICANCE BY ECONOMIC REGION

LOCATION	EVENT	TYPE	SUPPLIER
Midwestern Ontario			
Kitchener/Waterloo	Oktoberfest . German Festival, held annually	Cultural/ Recreational -social	Private, Non-Profit
Elmira	Elmira Maple Syrup Festival . sugaring-off festivities	Cultural/ Recreational -social	Municipal
Niagara			
Niagara Falls	Blossom Festival . complete with parades, ethnic dances and sporting events	Agricultural/ Recreational -general	Private, Non-Profit
St. Catharines	93rd Royal Canadian Henley Regatta . one of North America's largest rowing regattas	Recreational -sporting	St. Catharines Chamber of Commerce
	Niagara Grape and Wine Festival . ten days of celebrating the grape harvest	Agricultural/ Recreational -general	Private, Non-Profit
Central Ontario			
Toronto	Canadian National Exhibition . largest annual exhibition in the world	Cultural/ Agricultural Historical/ Recreational -general business-related	Municipal
	Royal Agricultural Winter Fair . North America's outstanding agricultural exhibition, featuring the Royal Horse Show	Agricultural Recreational -general -business-related	

continued . . .

TABLE II-2, continued

LOCATION	EVENT	TYPE	SUPPLIER
Toronto, continued	Canadian National Sportsman's Show . display of sporting goods and recreational activities	Business-related Recreational -general	Commercial
	Toronto International Boat Show	Business-related Recreational -general	Commercial
	Queen's Plate . oldest continuous horse race in North America	Recreational -sporting event	Commercial
	Mariposa Folk Festival . international festival of folk, blues and other forms of musical entertainment	Cultural/ Recreational - social	Private, Non-Profit
	Metro Toronto Caravan . 60 pavilions, featuring international food, drinks, entertainment and handcrafted souvenirs	Cultural/ Recreational -general	Private, Non-Profit
Lake Ontario			
Mosport	Can Am International Motor Racing	Recreational -sporting event	Commercial
	Canadian Grand Prix . features the world's leading Formula "1" drivers	Recreational -sporting event	Commercial
Eastern Ontario			
Ottawa	Canadian Tulip Festival . parades, fireworks and regattas	Cultural/ Recreational -general	Federal Government

continued . . .

TABLE II-2, continued

LOCATION	EVENT	TYPE	SUPPLIER
Ottawa, continued	Central Canada Exhibition . featuring a Grand Stand Show, horse show, midway, exhibits and agricultural displays	Agricultural/Recreational -general -business-related	Private, Non-Profit
Northwestern Ontario			
Kenora	International Lake of the Woods Sailing Regatta	Recreational -sporting event	
Thunder Bay	Canadian Ski Jumping Championships	-sporting event	Commercial

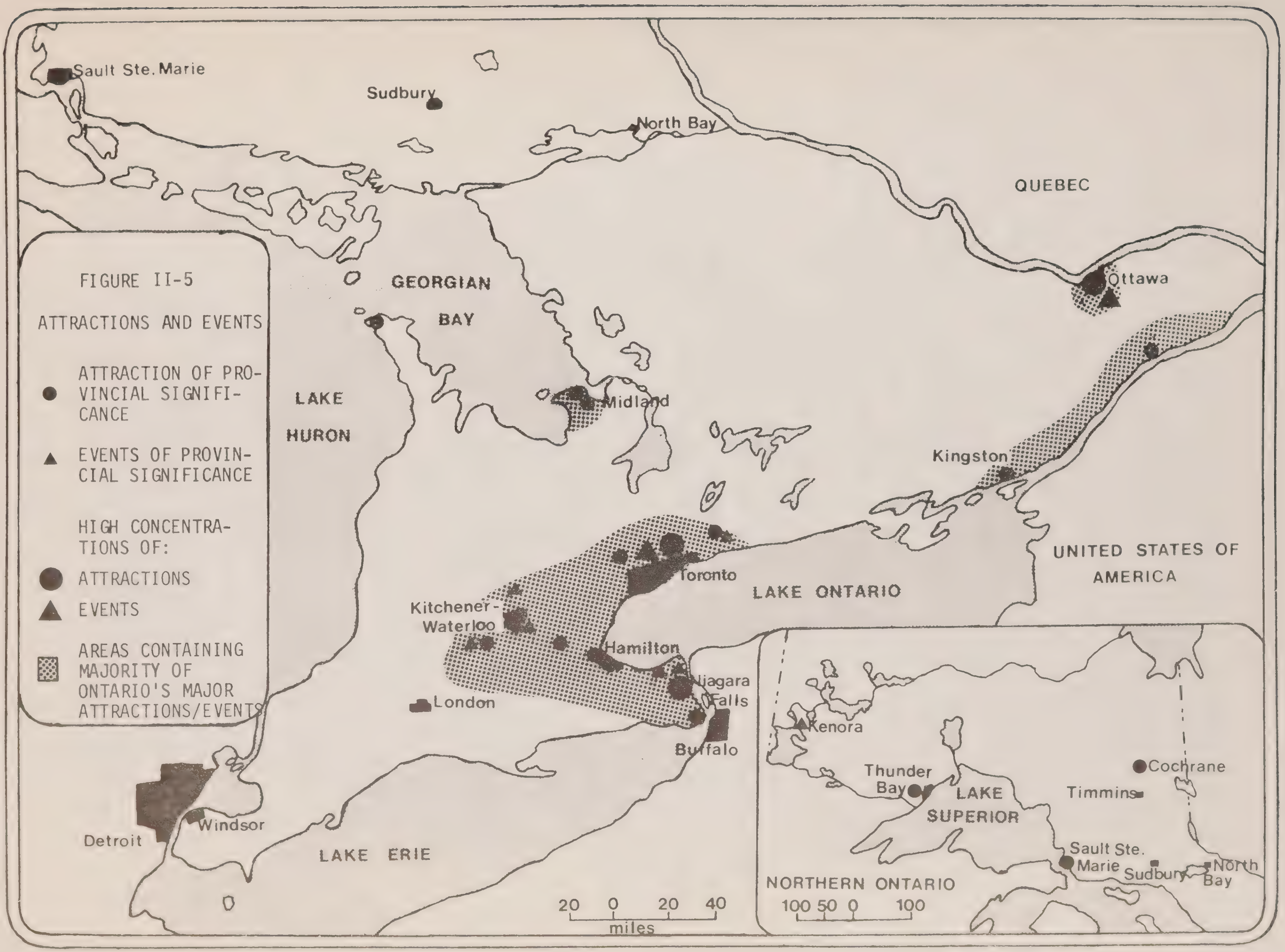


FIGURE II-5
ATTRACTIONS AND EVENTS
ATTRACTION OF PROVINCIAL SIGNIFICANCE
EVENTS OF PROVINCIAL SIGNIFICANCE
HIGH CONCENTRATIONS OF:
ATTRACTIONS
EVENTS
AREAS CONTAINING MAJORITY OF ONTARIO'S MAJOR ATTRACTIONS/EVENTS
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN
BAY
LAKE
HURON
Midland
Kingston
UNITED STATES OF
AMERICA
Toronto
LAKE ONTARIO
Kitchener-
Waterloo
Hamilton
Niagara
Falls
London
Buffalo
Detroit
Windsor
LAKE ERIE
20 0 20 40
miles
Kenora
Thunder
Bay
LAKE
SUPERIOR
Cochrane
Timmins
Sault Ste.
Marie
Sudbury
North
Bay
NORTHERN ONTARIO
100 50 0 100

The development of historical and ethnic themes may not necessarily entail construction of large scale attractions; it may merely involve improving or providing appealing atmosphere through minor enhancement, modification or restoration to support the existing physical plant.

Development themes could be utilized to unify and, thus, draw together larger geographical areas in which a number of attractions and events or a number of clusters occur. These areas, rather than individual attractions and events, will become the destinations. The wider range of opportunities will assist initially in attracting the interest of more people and maintaining interest for longer time periods, thus encouraging greater lengths of stay by greater numbers of visitors. Economically, it make much more sense to invest in areas where a number of features can be developed to support an historical theme and to give the visitor a variety of opportunities to explore that theme.

Obviously, tourism and profit-making are not totally the primary initiations for the establishment of historical and cultural attractions/ events. Pride in our heritage, perpetuation of customs, and protection of meaningful sites are often greater motivating forces than economics.

It is also important to preserve the cultural values of an area while benefiting from tourism.

> .... cultural values sometimes are in a delicate balance when, incidental to the original purpose, great visitation and its accompanying commercialism, tend to damage the attraction itself. Tourism can also be adversely affected..... If these conditions of balanced tourist inflow, good service and balanced range of attractions are not met, decay is likely to set in, and although the results may not be apparent at first, in the end both quality and volume of tourism may suffer, with consequent economic as well as social and cultural losses (Gunn, 1972, p.25).

Following are some probable trends affecting attractions and events. Due to shifts in age groups and increases in disposable income, it is predicted that Canadians will travel more in the future and will take more vacations. There will be more winter and shoulder season vacations. This will necessitate the year-round operation of some attractions requiring winterizing of facilities, hiring of permanent staff, etc., and the development of more major events in seasons other than summer.

Attractions and events will remain urban-related. Since Southern Ontario has the highest urban population concentrations at the present time, and indications are that this will continue to be the case, most of the attractions

and events, and certainly all of the major man-made privately owned attractions and events will be developed in Southern Ontario.

Due to increased energy and general living costs, and increased emphasis on environmental values, clustering of attractions will become more important. People will increasingly seek multi-dimensional vacation areas and packaged tours. Themes will be the unifying element which will bind together the vacation area and indicate the nature of the attractions and events offered. This will necessitate the co-ordination of existing and proposed clusters of attractions and events to reinforce the theme of an area. In addition to the development of themes, support systems such as transportation networks, service centres and restaurants, should be upgraded in order to supply a well-rounded and pleasurable travel experience for the tourist.

D. Accommodation

The variety, quantity and quality of accommodation is an essential element of the overall tourism plant. It is important to note that tourism does not necessarily involve an overnight stay. However, expenditures rise sharply if there is an overnight stay. This would involve not only some form of accommodation, but also food and perhaps shopping and entertainment. Ontario is well supplied with a great number and variety of accommodation establishments. These include private sector commercial facilities (e.g., hotels, motels, seasonal resorts, rental cottages and cabins, campgrounds, etc.), public sector facilities (e.g., national, provincial and municipal campgrounds, conservation areas, etc.) and privately owned dwellings (e.g., second homes/cottages, chalets).

Year-round occupancy rates for hotels, motels and campgrounds indicate that there are no overall shortages of accommodation. There are, however, seasonal shortages of certain types of accommodation in certain places. Most deficiencies appear to be related to recreational travel rather than business travel. Problems exist with the fluctuating quality of accommodation services across the Province, and no rating scheme exists to guide travellers to facilitate their desired quality and price level.

Approximately 225,000 second homes (e.g., cottages, chalets) are located in Ontario and are an important reason for tourism travel. There are more second homes per capita in Ontario than in any other province or state, and approximately 40% of all Ontario families make use of a cottage each year.

Some comments on tourism accommodation trends follow:

1. Less money will be available for accommodation expense;
2. The demand for camping will remain strong;
3. There will be increased use of condominiums, self service, hospitality types of accommodation;
4. The demand for simple, low cost, seasonal facilities is expected to grow;
5. The total amount of leisure time available will increase, resulting in a growing demand for longer weekend tours and, as a result, an increased demand also for a variety of accommodation types in fairly close proximity to major population centres;
6. More emphasis on environmental values; encouraging increased clustering of man-made attractions and multi-dimensional vacation spots. This will result in an increased demand for a variety of accommodation types within or near attraction clusters.
7. With increased vacationing during the shoulder periods and off-seasons, there will be a corresponding increased demand for accommodation which is suitable for winter vacationing. Due to the hazards of winter driving, these accommodation types should be close to high population centres and transportation corridors so that forms of transportation other than the private car can be used.

Cottages

Whether or not the demand for second residences will increase in the years to come is subject to a great deal of controversy. Some of the factors positively affecting future demand are:

1. an increased desire to get away from the urban environment;
2. changes in patterns of the work week or school year, resulting in a drop in the weekend traffic leaving the city (this should encourage a greater demand for cottages);
3. increased number of people from the baby boom era reaching the age at which the majority of cottage purchases are made; and
4. the increasingly prohibitive cost of home ownership in the large urban centres of Ontario is currently attracting young families to investing in less expensive suburban property.

Some of the factors negatively affecting future demand for cottages are:

1. increased popularity of camping and trailering;
2. increased trend toward international vacations rather than cottage vacations;
3. changing family patterns (i.e., postponement of having children), resulting in a desire not to be tied down by a second home;
4. increased usage of commercial accommodation for travel;
5. increasingly stringent controls over presently undeveloped land, resulting in a decreased supply of cottage lots; and
6. dramatically increasing cost of cottage land, particularly in Southern Ontario.

Indications are that the private sector will continue to provide most of the future supply of cottage lots. Crown land lots will partially satisfy the demand of Ontario residents for cottaging opportunities once public recreation requirements are satisfied and provision is made to protect the quality of the natural environment. Crown land cottaging lots will be made available primarily in Northwesten Ontario due to the accessibility of relatively large acreages of suitable land. Because of the pressures on the supply of land in Southern, and to a lesser extent Northeastern, Ontario crown land will be provided more for public, rather than private, recreation purposes in these areas.

Due to the increased pressures in the supply of land and lake shoreline, there will be a growing demand for new forms of cottaging. As a result, there will be a tendency toward cluster development, condominiums or even apartment units on or with access to lake shorelines. Winterizing of cottages, particularly those that are located in proximity to urban centres, will continue. In addition, there may be a trend toward the use of houseboats, cruisers and large sailboats in the place of cottages.

E. Information Services

Man-made, cultural and environmental features become tourism resources only when they are perceived as such. The finest physical facilities can be provided but if visitors find them unappealing, misunderstand them, have difficulty in locating them or feel unwelcome, the investment is of small value. Consequently, information services must be of as great a concern as the actual tourism resource itself. Information services impart to the

tourist knowledge about attractions/events and facilities, and assist them in locating, understanding and enjoying these features.

Information is distributed through publications, media programs, travel information centres and word of mouth. The high quality of the Province of Ontario publication and media programs is well known, and the quality of regional and local promotional programs is increasing. Travel information centres are operated in strategic locations by the Ministry of Industry and Tourism (19 centres), travel associations, chambers of commerce and municipalities.

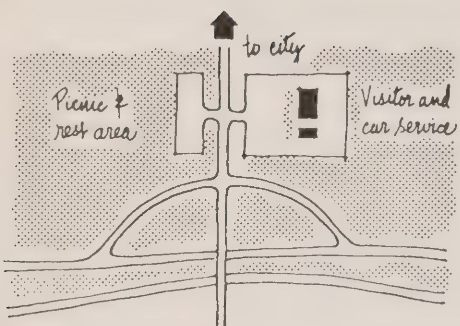
Demand is increasing and will probably continue to increase in the future for more specialized information about tourism opportunities. This is due mainly to the general increase in levels of education.

Currently, promotional publications generally consider attractions, events, activities, accommodation and transportation separately; documents should be produced that provide information about all these components for any one destination in one booklet.

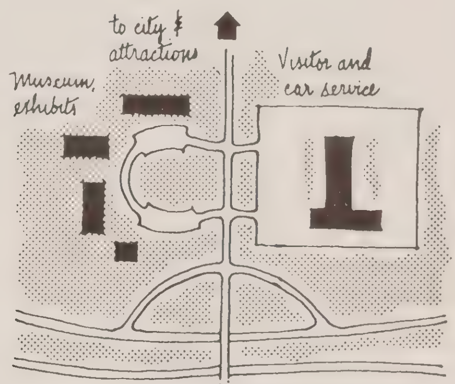
A type of hospitality resource that is presently not readily available in Ontario, but should be considered for the future, is what Gunn (1972) refers to as a "hospitality plaza". This facility differs from the more well-known service plaza or centre (located at an exit to a community) in that it is located "within the heart of the attraction destination region" and at provincial boundaries. This is where the plaza can function best to provide extensive information and guidance services.

> Published guides, maps, directories, and promotional tourist literature would be available. In addition, trained counselors would advise the traveler on all matters pertaining to the attractions, services, and facilities available from this exit. Ideally they would be linked with a central computer system which could provide minute-by-minute guidance on accommodations, weather, hours of admission to featured attractions, entrance charges, and other significant information about distant locations.

A modification of this type of plaza would include a major interpretation area. Within and outside buildings, exhibits would show the points of interest available from this location. Models, samples of minerals, and illustrated dioramas might induce the traveler to investigate the things to see and do that are reachable from this exit (Gunn, 1972, pp. 94 and 95).



SERVICE PLAZA



HOSPITALITY PLAZA

Source: Gunn, 1972, p. 94.

Better co-ordination of information and direction services should be developed among local, regional and provincial levels, and between the public and private sectors to decrease duplication and increase comprehensiveness.

More training programs should be instigated to better equip persons who deal directly with tourists at the local level to provide more adequate information and directions.

F. Transportation

Tourism is inseparable from travel. Essential as the attractions, services and facilities are, they are of little value unless transportation and access are provided to and from them. In fact, tourism may exist without man-made attractions, without entertainment centres or even without motels and hotels for those individuals who are nature lovers or urban escapists; but even for these types of tourists, tourism is inconceivable without transport.

A good transportation network encourages tourism, and some modes of travel may be attractions themselves (e.g., canoeing, other boat rides).

The factors distance, time and cost, influence the selection of the mode of transport. Distance to a destination is probably the most significant factor influencing choice of transportation. As the distance from origin to destination increases, a shift from private automobile to air is apparent with travel by bus and rail lying between the two. Two other important components which influence the selection of mode of travel are convenience and accessibility. The private automobile for short distance trips is the most convenient means of travel because it provides great flexibility. There are some areas in the Province which are only accessible by air, thus dictating the mode of travel.

Most tourists in Ontario, with the exception of the overseas visitor, use the private automobile. The expected increase in cost of fuel and decreases in speed limits will affect automobile use. However, it is expected that the shift to other modes will be relatively insignificant and that the private automobile will continue to be used by the majority of tourists. There may be a shift to smaller, more economical cars, and distances travelled may be reduced.

Many problems, such as congestion, exist with all transportation services which have severe peaks, unbalanced flows and seasonal patterns. There are also strains which are being felt on energy and resources. A recent study* has predicted that both weekend and vacation trips will increase because of the increase in: population, leisure time per capita, awareness of the outdoors, and the need for relief and contrast from the big city environment.

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*L. F. D'Amore and Associates Ltd., Tourism in Canada 1986, Round I, Delphi Survey (in progress).

G. Service Centres

Service centres provide:

1. direct services (hotels, motels, restaurants, gift shops, gasoline stations, entertainment);
2. secondary suppliers to tourism (food and other wholesalers, laundries, construction companies, insurance and accounting agencies).

Cities are critical to the provision of these services. Cities themselves also provide historical and cultural attractions and events.

If there is to be additional development and expansion of services, then existing urban centres should be the focus for this provision. This utilizes existing investment in public services rather than creating newly planned communities, at great initial investment cost. The existing urban system is expected to change little in the next 30 years, and population will continue to gravitate toward the large urban centres in Southern Ontario. Consequently, the current disparities in levels of diversity and specialization between Southern service centres and their counterparts in Northern Ontario are likely to persist or possibly increase.

If tourism development is clustered in geographic areas, then the roles of the service centres in these areas will be strengthened.

There are currently numerous small service centres which supply seasonal tourism services. Those centres serving areas where the tourist season becomes year-round will maintain those services throughout the year and there will be a propensity for the increase of their quality. Finally, all tourism-related service centres in a hinterland where the tourism season is extended can be expected to increase not only the quality, but also the quantity and diversity of the supply goods and services as it becomes economically viable to do so.

H. Population/Labour Supply

Population is a major factor affecting many aspects of development. Demographic trends, including changes in population size, geographical distribution, age composition, family size, and percent in labour force are all important.

Population "consumes" the tourism product, provides the labour force for the plant, and may provide part of the attraction or event in terms of ethnic and cultural heritage. Visiting friends and relatives is the motivating force which induces much travel. In fact, this is the single most important motive for travel and has a pervasive influence throughout the industry.

The trends in the geographic distribution and composition of the population are important to tourism development. First, population growth will be concentrated in the large urban complexes. It is forecast that 80 percent of the Provincial population will be located along the Windsor-Montreal axis by the year 2001. The large metropolitan areas will generally increase twice as rapidly as the remainder of the Province. Northern and Eastern Ontario are expected to have the slowest growth. This could affect the development potential for tourism and the level of services.

Cultural, historical and man-made attractions of the magnitude that will draw large volumes of visitors requires a large local population to make such opportunities economically viable. For these reasons, the majority of the Provincially significant attractions and events are currently clustered in or near the large urban centres in Southern Ontario. Those that have been developed in less populated areas of the Province (Northern and Eastern Ontario, except Ottawa), have involved public funding. The services are more extensive and diversified in Southern Ontario than in the North and East. This, again, is a reflection of the population concentration of major Southern urban centres.

Tourism is a labour intensive industry. A large share of the labour needed by the tourist industry is of the part-time, seasonal and low status variety. Changes in the character of the labour force have significant implications for the tourism industry. The labour force is becoming increasingly better educated. The unskilled, low status jobs will be more difficult to fill. These jobs are generally filled by women, pensioners, students and immigrants. Women are becoming more educated, giving up the option to bear children, and are entering the labour force on a full-time basis. They will be less satisfied with low skill, seasonal or part-time employment. There will be more women making careers in the hospitality industry and more women in managerial and executive positions.

The current immigration policy encourages the skilled and professional people rather than less skilled. This is expected to continue. The tourist industry cannot look to immigrants to fill the low skill jobs. Perhaps contract immigrant "guest labour" may provide a partial solution.

The predicted acceleration of urbanization may aggravate the difficulties of obtaining labour outside urban areas and may be a critical factor in the growth of resort and other non-urban tourism.

CHAPTER III

TRAVEL MARKETS

A. Introduction

Tourism development is, in essence, the identification of a marketing strategy--the matching of tourism resources of an area with the market demands. The objective of this discussion is to gain insight into potential markets for tourism development by reviewing characteristics now exhibited by present users and studies of visitor preferences. Destination areas with high visitation will be identified, together with the activities drawing participation in these areas and the economic benefits related to activities. More detailed information about current markets will be found in Appendix B.

B. Origin and Size of Market Groups

Table III-1-Origin of Tourists in Ontario - 1973

Origin Group	Number of Person Visits (Million)	%
Ontario	60.7	64
U.S.A.	23.3	25
Rest of Canada	9.7	10
All Other	.7	1
Total	94.4	100

Source: Tourism Statistical Handbook 1975 and Travel Between Canada and Other Countries, Statistics Canada, August 1975

Most of the total tourism travel in Ontario is done by Ontario residents (Table III--1). Figure III-1 shows the percentage of visitors to economic regions for the first three origin groups. No detailed information is available for the "All Other" origins.

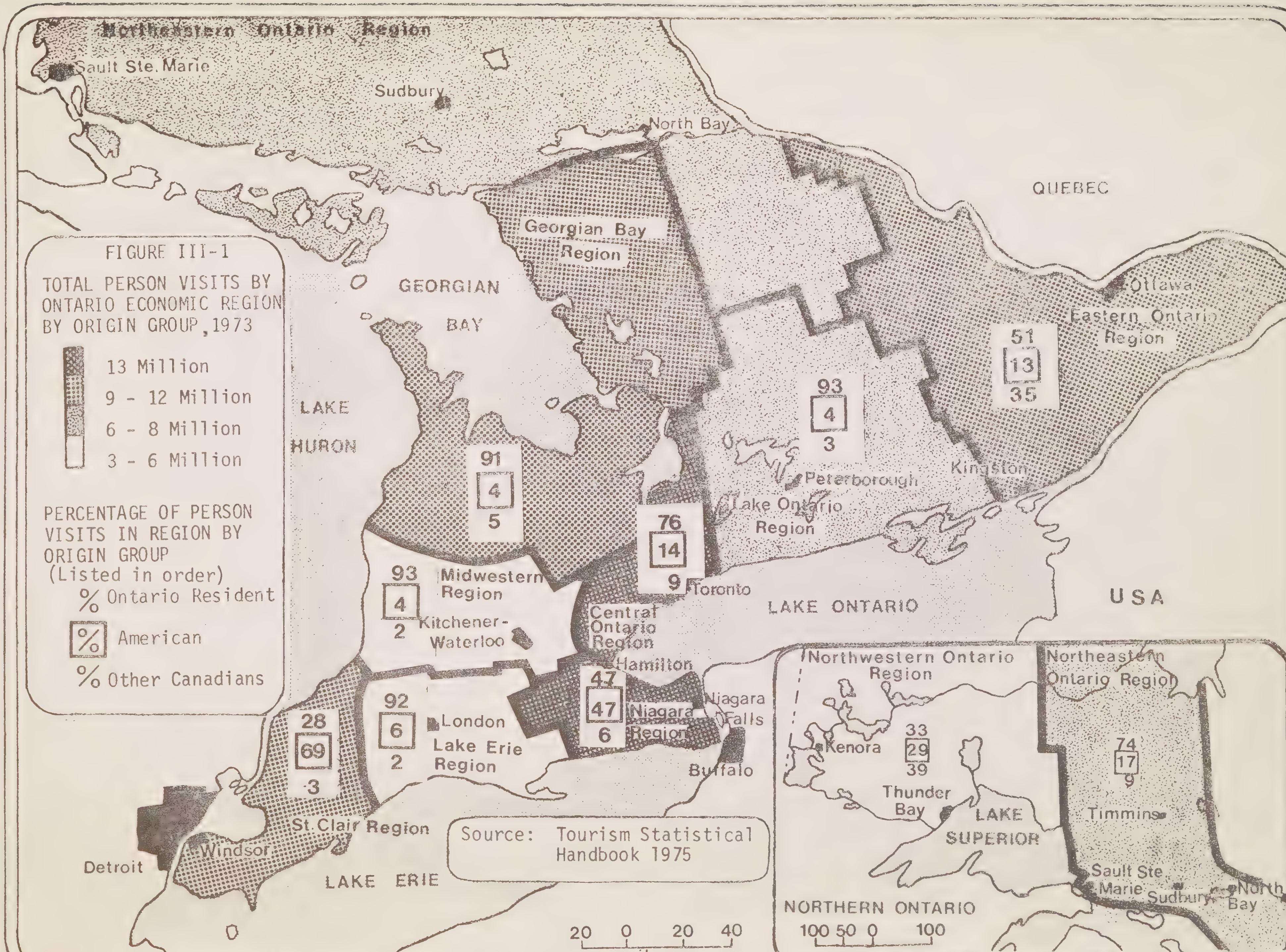
FIGURE III-1
TOTAL PERSON VISITS BY ONTARIO ECONOMIC REGION BY ORIGIN GROUP, 1973
13 Million
9 - 12 Million
6 - 8 Million
3 - 6 Million
PERCENTAGE OF PERSON VISITS IN REGION BY ORIGIN GROUP
(Listed in order)
% Ontario Resident
% American
% Other Canadians
Northeastern Ontario Region
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Georgian Bay Region
GEORGIAN BAY
LAKE HURON
Ottawa
Eastern Ontario Region
51
13
35
93
4
3
Kingston
Peterborough
Lake Ontario Region
91
4
5
76
14
9
Toronto
93
4
2
Midwestern Region
Kitchener-Waterloo
Central Ontario Region
LAKE ONTARIO
USA
Hamilton
47
47
6
Niagara Region
Niagara Falls
Buffalo
92
6
2
London
Lake Erie Region
28
69
3
St. Clair Region
Windsor
Detroit
LAKE ERIE
Source: Tourism Statistical Handbook 1975
20 0 20 40
Northwestern Ontario Region
Kenora
33
29
39
Thunder Bay
LAKE SUPERIOR
Northeastern Ontario Region
74
17
9
Timmins
Sault Ste Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

C. Analysis of Activities by Region

1. Ontario Resident- Vacation (Figure III-2)

Non-business activities of the Ontario resident are outdoor oriented. The activity 'cottaging' accounts for a high percentage of the user-days in all regions with the exception of the Niagara region. "Boating', 'fishing' and 'camping' are also high participation activities in all regions of the Province. The 'hunting' user-days in the Northwestern region are substantially higher than other regions. In the Central Ontario region an above average participation in activities, such as 'attending a special event', 'recreational driving/touring', 'visiting a museum or art gallery' and 'visiting a historic site or display' takes place. The increase in participation in these activities may be attributed to opportunities afforded to the visitor by Toronto. (Weekend-Figure III-3)

3. United States Visitors' Activities (Figure III-4)

The regions in the Province with the greatest number of American non-business user-days are the border regions.

4. Other Canadians' Activities (Figure III-5)

Throughout all regions in the Province, the greatest number of other Canadians' non-business user-days are spent 'visiting friends or relatives' (with the exception of the Niagara region where 'touring' receives a slightly higher number of user-days than 'visiting friends or relatives').

D. Travel Expenditures by Destination (Figure III-6)

Total travel expenditures in the Province in 1973 were approximately $1,692,000,000.* The greatest expenditures were made in the Central Ontario/ Metropolitan Toronto area. The Niagara and Eastern Ontario Regions received the next most significant amount of direct travel revenue. The fact that these two regions were border crossing points explains the high expenditures by non-residents, with the U.S. visitor contributing 61 percent of the total tourist receipts to the Niagara Region and other Canadian visitors' expenditures comprising 44 percent of the total tourism expenditures in the Eastern Region.

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*Total expenditure does not include either preparation expenditure or expenditure by visitors from foreign countries other than the United States. The estimated 1975 travel-related expenditures were $2.6 billion.

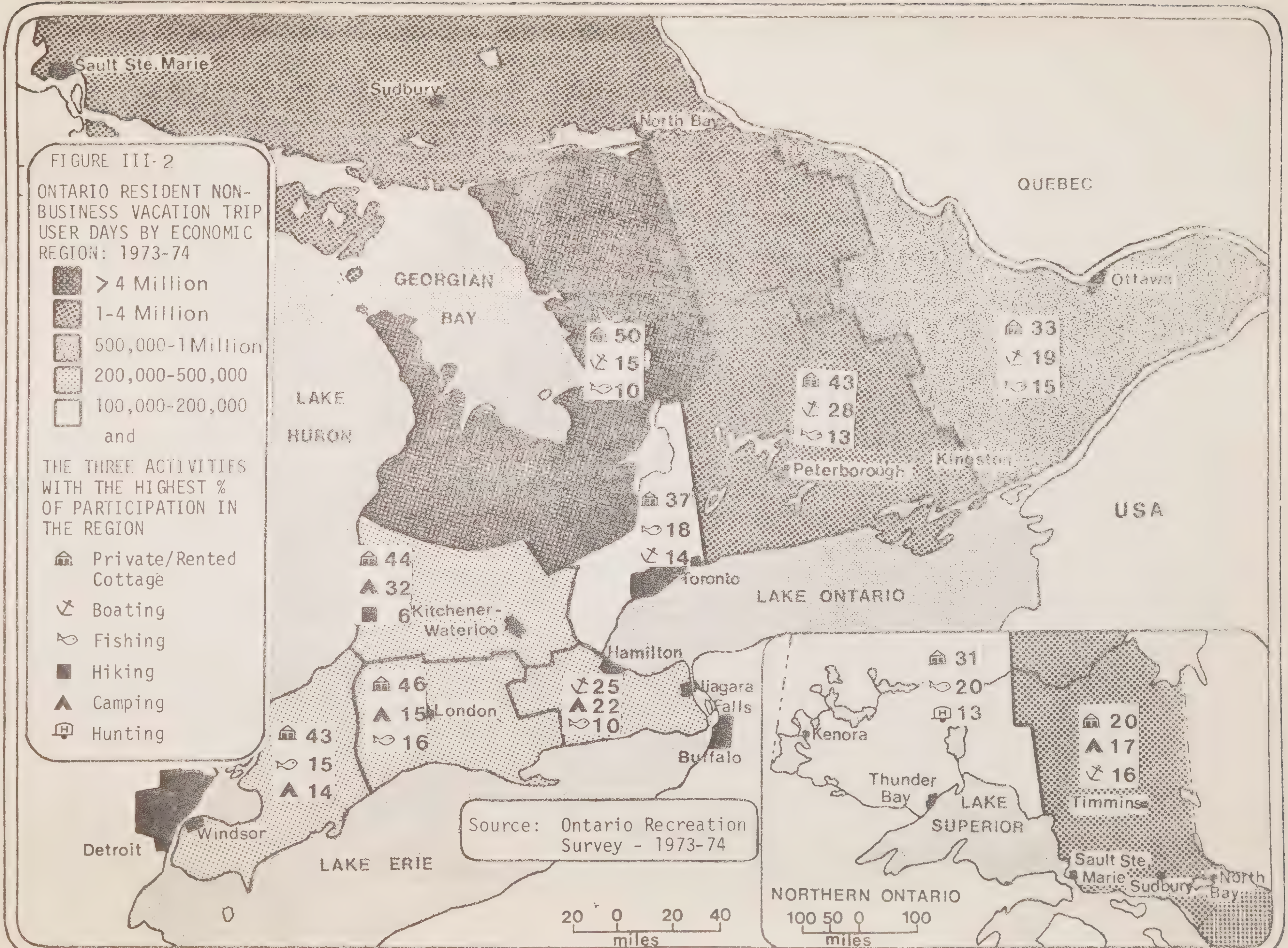

FIGURE III-2

ONTARIO RESIDENT NON-BUSINESS VACATION TRIP USER DAYS BY ECONOMIC REGION: 1973-74

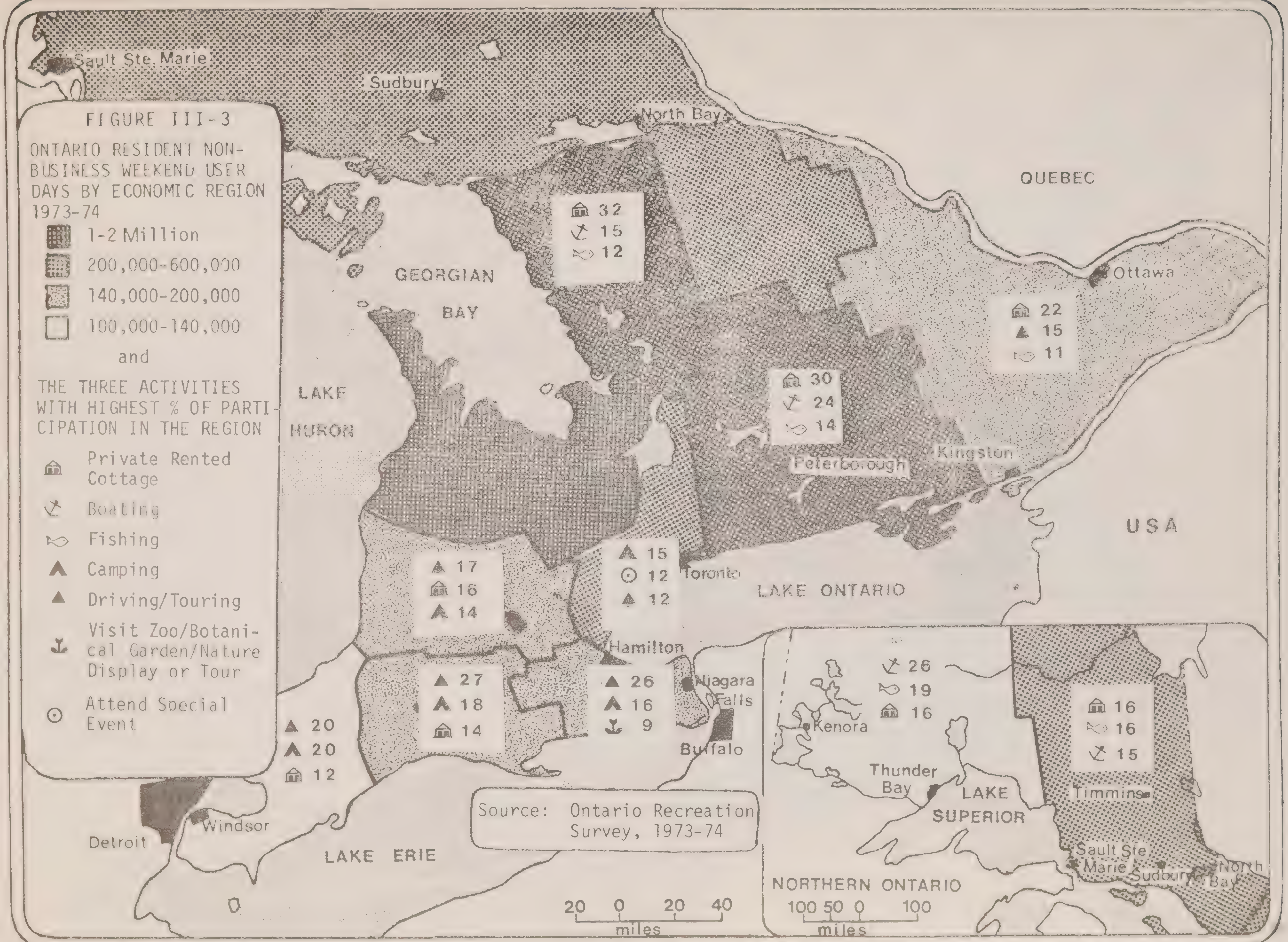

FIGURE III-3
ONTARIO RESIDENT NON-BUSINESS WEEKEND USER DAYS BY ECONOMIC REGION 1973-74
1-2 Million
200,000-600,000
140,000-200,000
100,000-140,000
and
THE THREE ACTIVITIES WITH HIGHEST % OF PARTICIPATION IN THE REGION
Private Rented Cottage
Boating
Fishing
Camping
Driving/Touring
Visit Zoo/Botanical Garden/Nature Display or Tour
Attend Special Event
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
GEORGIAN BAY
LAKE HURON
Ottawa
Kingston
Peterborough
Toronto
Hamilton
Niagara Falls
Buffalo
USA
LAKE ONTARIO
LAKE ERIE
Windsor
Detroit
32
15
12
30
24
14
22
15
11
17
16
14
15
12
12
27
18
14
26
16
9
20
20
12
Source: Ontario Recreation Survey, 1973-74
20 0 20 40
miles
26
19
16
16
16
15
Kenora
Thunder Bay
LAKE SUPERIOR
Timmins
Sault Ste Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100
miles

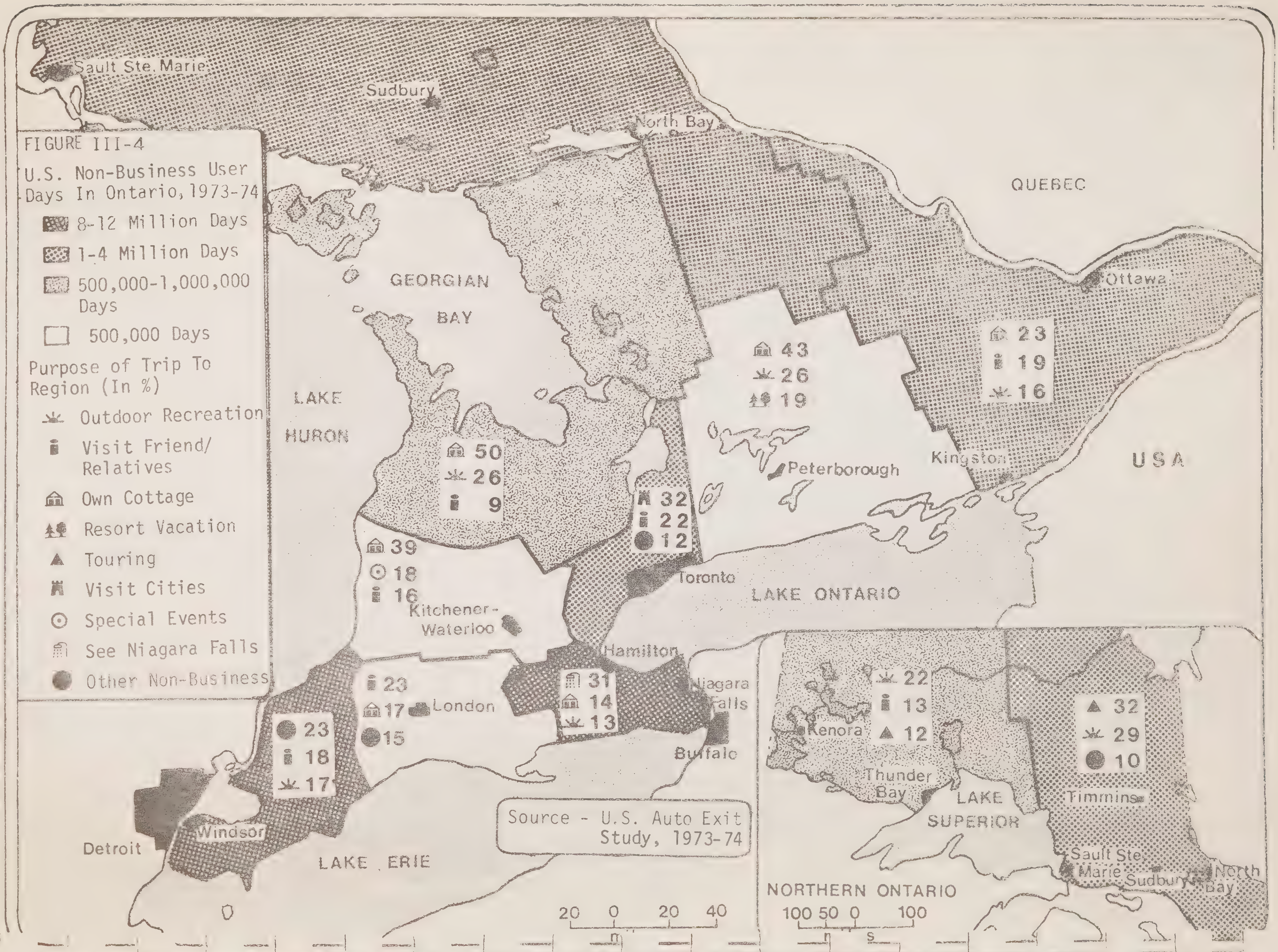
FIGURE III-4
U.S. Non-Business User Days In Ontario, 1973-74
8-12 Million Days
1-4 Million Days
500,000-1,000,000 Days
500,000 Days
Purpose of Trip To Region (In %)
Outdoor Recreation
Visit Friend/ Relatives
Own Cottage
Resort Vacation
Touring
Visit Cities
Special Events
See Niagara Falls
Other Non-Business
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN
BAY
LAKE
HURON
43
26
19
23
19
16
Kingston
USA
Peterborough
50
26
9
32
22
12
39
18
16
Toronto
LAKE ONTARIO
Kitchener-Waterloo
Hamilton
23
17
London
15
31
14
13
Niagara Falls
Buffalo
23
18
17
Windsor
Detroit
LAKE ERIE
Source - U.S. Auto Exit Study, 1973-74
20 0 20 40
m
22
13
12
Kenora
Thunder Bay
LAKE SUPERIOR
32
29
10
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100
s

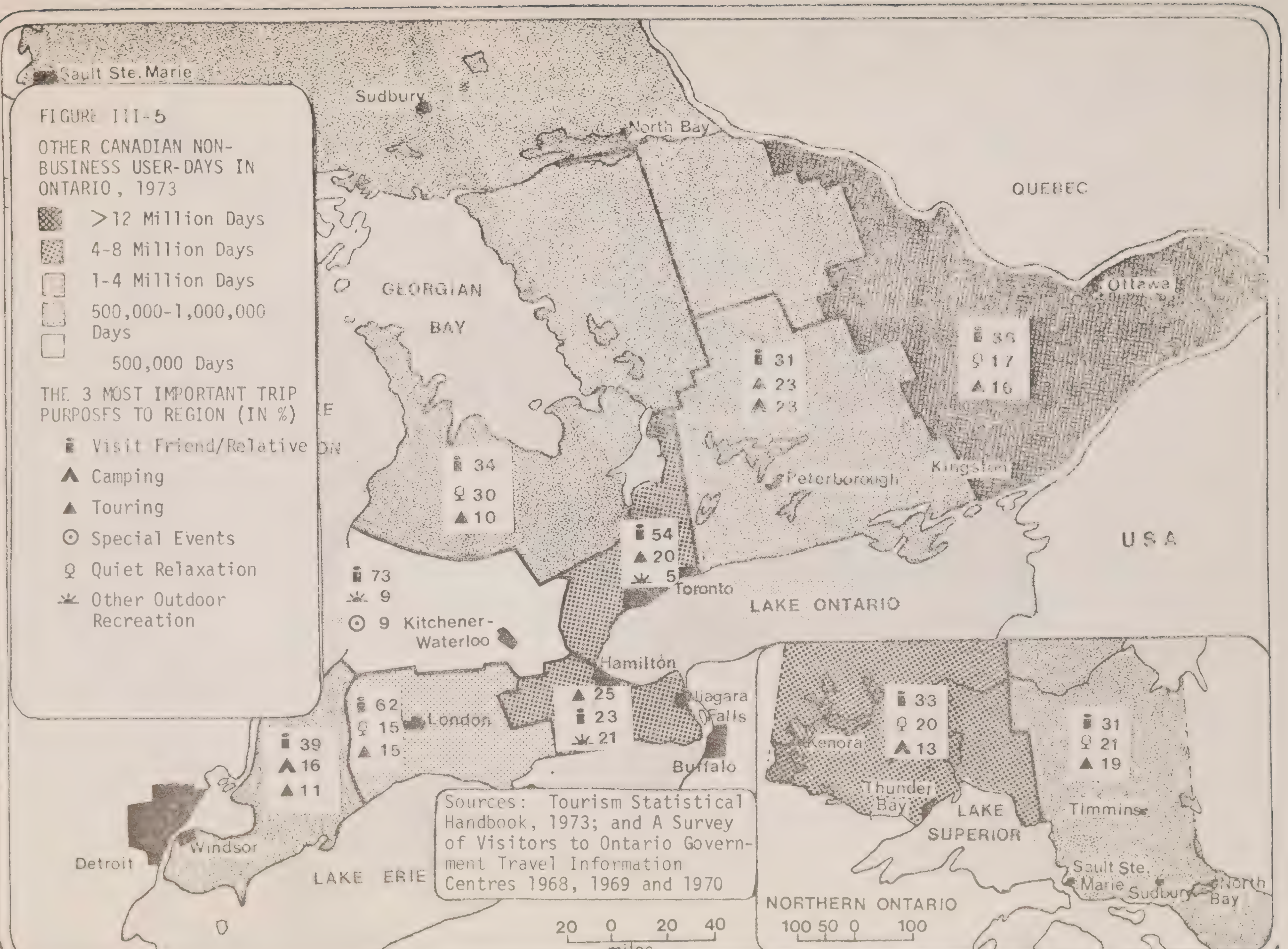
FIGURE III-5
OTHER CANADIAN NON-BUSINESS USER-DAYS IN ONTARIO, 1973
>12 Million Days
4-8 Million Days
1-4 Million Days
500,000-1,000,000 Days
500,000 Days
THE 3 MOST IMPORTANT TRIP PURPOSES TO REGION (IN %)
Visit Friend/Relative
Camping
Touring
Special Events
Quiet Relaxation
Other Outdoor Recreation
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
GEORGIAN
BAY
Ottawa
17
16
31
23
23
34
30
10
Kingston
Peterborough
54
20
5
Toronto
73
9
9
Kitchener-Waterloo
LAKE ONTARIO
USA
Hamilton
25
23
21
Niagara Falls
Buffalo
62
15
15
London
39
16
11
Windsor
Detroit
LAKE ERIE
Sources: Tourism Statistical Handbook, 1973; and A Survey of Visitors to Ontario Government Travel Information Centres 1968, 1969 and 1970
20 0 20 40
miles
33
20
13
Kenora
Thunder Bay
LAKE SUPERIOR
31
21
19
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

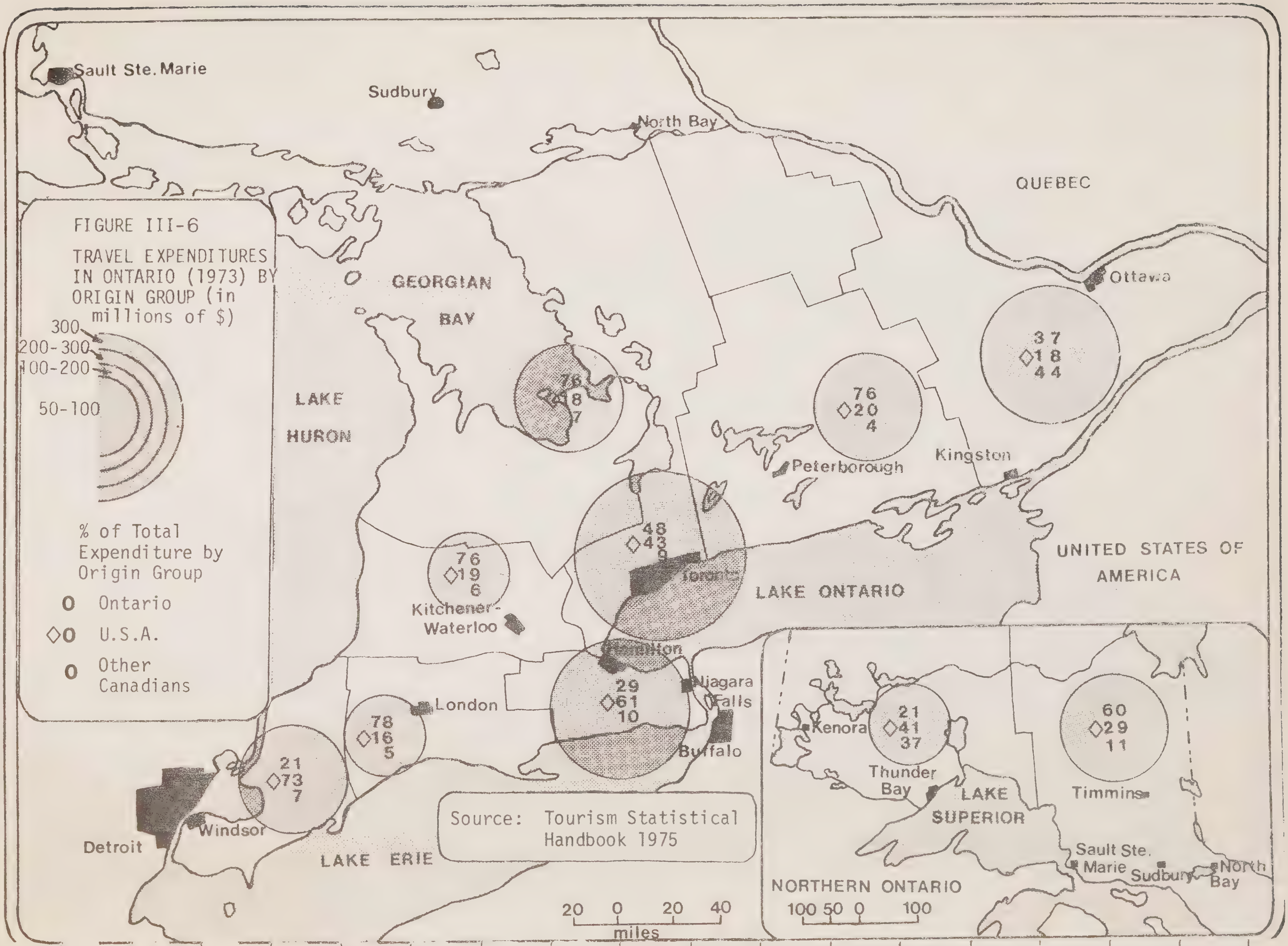
FIGURE III-6
TRAVEL EXPENDITURES IN ONTARIO (1973) BY ORIGIN GROUP (in millions of $)
300
200-300
100-200
50-100
% of Total Expenditure by Origin Group
O Ontario
◇O U.S.A.
O Other Canadians
Source: Tourism Statistical Handbook 1975
Sault Ste. Marie
Sudbury
North Bay
QUEBEC
Ottawa
GEORGIAN BAY
LAKE HURON
Peterborough
Kingston
UNITED STATES OF AMERICA
LAKE ONTARIO
Toronto
Hamilton
Niagara Falls
Buffalo
Kitchener-Waterloo
London
Windsor
Detroit
LAKE ERIE
37 ◇18 44
76 ◇20 4
76 ◇18 7
48 ◇43 9
76 ◇19 6
29 ◇61 10
78 ◇16 5
21 ◇73 7
20 0 20 40
miles
Kenora
21 ◇41 37
Thunder Bay
LAKE SUPERIOR
60 ◇29 11
Timmins
Sault Ste. Marie
Sudbury
North Bay
NORTHERN ONTARIO
100 50 0 100

There appears to be a direct relationship between travel expenditures and regions with urban centres. The highest tourism expenditures occurred in the regions with large urban centres (Toronto, Ottawa, Niagara Falls, Hamilton and Windsor). Apparent, also, is the high percentage of non-resident expenditures in regions with border crossings. In the St. Clair, Niagara and Northwestern Regions the highest percentage of the total tourism revenue was from the U.S. resident, and in Eastern Ontario other Canadians contributed the highest percentage to the Region's tourism receipts.

E. A Synthesis of Person-Visits and Travel Expenditures Related to Activity Participation (Figure III-7)

Participation in activities occurs in areas where the opportunity is available. The resource base of each region obviously does not provide opportunities for participation throughout the entire region. Thus, it is possible, by comparing the existing plant and the activities participated in, to define more clearly the areas in the Province with substantial visitation.

Upon identifying the areas within the Economic Region where visitation predominantly occurs, it is possible to determine what areas in the Province receive the greatest number of visitors and the areas where the highest expenditures are made. The rating on Figure III-7 is a synthesis of Total Person Visits by Ontario Economic Region (Figure III-1) and Travel Expenditure in Ontario (Figure III-6).

The purpose for rating these destination areas is best described by the following example. The destination areas with the highest visitation and largest expenditures are Toronto and surrounding areas, Hamilton-Niagara Falls area, and Ottawa and area. The activities accounting for a large number of user-days for all origin groups in the two urban centres are 'attending an event', 'sightseeing in Ontario cities' and 'visiting friends and relatives'. In the Hamilton-Niagara Falls area the important activities are 'viewing Niagara Falls', 'cottaging', and 'boating'. The high visitation to these areas and the relatively high tourism expenditures would suggest that these would be areas for successful tourism investment and the types of investment should relate to the activities in which the visitors engaged.

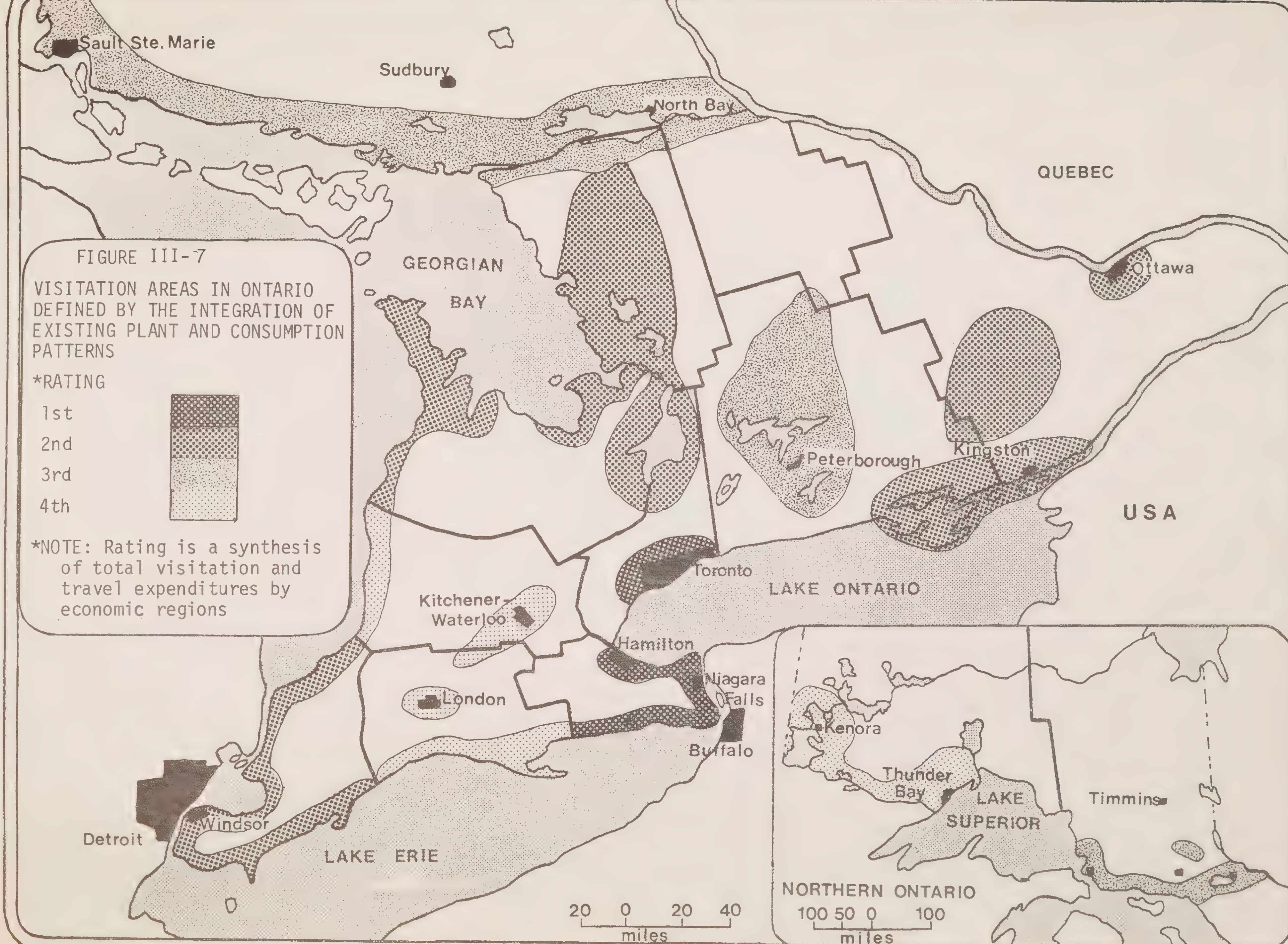

FIGURE III-7

VISITATION AREAS IN ONTARIO DEFINED BY THE INTEGRATION OF EXISTING PLANT AND CONSUMPTION PATTERNS

*RATING

1st

2nd

3rd

4th

*NOTE: Rating is a synthesis of total visitation and travel expenditures by economic regions

Other components must be reviewed before investment opportunities can be identified or zones can be delineated. Some of these other components are:

1. the capacity of the resource base for additional usage;
2. possible themes in each area;
3. types of activities participated in.

F. Significance of Tourist Markets by Origin

This investigation of travel market characteristics has revealed the significance of each market group to Ontario tourism and enabled a preliminary assessment of each market group's potential.* The following list presents those market groups which appear to have the most potential:

a. Ontario Resident--this market group is, and will likely remain, the most important market.
b. Quebec and Manitoba--by virtue of geographic proximity, this market group has potential for greater market development.
c. Alberta and British Columbia--this market group has not received much attention to date, but appears to be growing rapidly.
d. United States--by virtue of its proximity and size of population, this market must be regarded as a high priority market.
e. British Isles--this is a large market which could be further developed if economic conditions improve; presently this market group's major activity is visiting friends or relatives, but there is evidence that other activities have appeal.
f. West Germany -- as a large and rapidly growing overseas market, has proven potential; activities which appeal to this market are primarily outdoor recreation-oriented.
g. Japan--has developed as a tourist market because of the initial exposure of Japanese businessmen; present activities are largely related to urban-centered tours, but are expected to expand as Ontario becomes more familiar to this group.
h. Holland--is a small market but has demonstrated tourism potential for Ontario; the primary tourist activity currently for this market is visiting friends or relatives.

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*To assess the potential of overseas market groups indepth discussions were held with the Tourism Marketing Branch, Ontario Ministry of Industry and Tourism and other Tourism officials.

i. Italy--is a relatively large market; the tourism potential of this market, however, is somewhat limited because their prime activity is to visit friends and relatives and a very small percentage participate in secondary activities.

Ontario has numerous other market groups which are not discussed here because of their relatively small size.

General trends in travel behaviour must be considered when assessing the benefits of the various travel markets. Some of the most significant trends are:

1. Ontario residents will continue to leave the Province for vacations during the winter months for southern sun and sand and to visit friends and relatives;
2. Weekend travel by Ontario residents within the Province will increase for skiing (both downhill and cross-country), snowmobiling, visiting winterized cottages and other winter activities; and
3. Both United States and overseas (primarily Europe) visitors will continue to come to Ontario to visit friends and relatives, for outdoor recreation activities and to visit clean, safe cities.

It is also apparent that the greatest potential to increase American and overseas visitation lies in the development and promotion of specialized activities (e.g., canoe trips, special events, man-made attractions,etc.) and especially organized tours. To increase these travel markets, however, it is important that the quality of the product together with price be internationally competitive.

G. Probable Future Conditions

Since the end of the Second World War, the economic trends have been fairly consistent. The standard of living has increased steadily. Incomes and discretionary incomes have risen uniformly. All projections made up to 1972 foresaw no shifts in these trends. However, in 1973, these trends changed when Canada, as well as many other countries, felt some impact of the 'energy crisis'. Inflation became a more serious problem. Gasoline

prices rose sharply and there were sharp increases in overseas air fares. Real incomes stopped rising.

These changed conditions will influence tourism, but it is difficult to predict the specific effects. There is the possibility of a less mobile population and a decrease in the amount of discretionary income available for travel. It is likely that the cost of operating accommodation and travel services will increase substantially, which will slow recent trends toward the democratization of domestic and world tourism.

In Ontario, the number of Americans arriving decreased in 1975. There was a dramatic decrease in the number of people entering Ontario by air. On the other hand, the number of overseas travellers to Ontario increased.

The tourist operator can expect a slowly growing demand for vacations that do not involve extensive use of the automobile, increased demand for group travel, high volume and low-cost packaged tours, and for single-destination holidays to major urban areas and vacation resorts.

Tourism is one area that has been affected by increased fuel costs and by effective promotion of energy conservation. This is not indicated by a decline in travel per se. Rather, it has resulted in:

- slightly reduced use of cars and a corresponding increase in the usage of lower energy consuming modes of travel (i.e., airplanes, buses, trains, etc.)
- shorter trips
- new emphasis on single destination vacations as opposed to touring trips
- an increase in group tours, utilizing transit forms as their mode of transportation.

Not unexpectedly, the effects of increased fuel costs are most strongly felt by the lower-middle and lower classes. Therefore, in the future, people in the lower classes are less likely to travel than those in the higher income brackets unless assistance is provided.

The upward shift in the average age of the population will affect tourism demand in the future. This will result in a decrease in the demand for youth hostels. Increases in the 20 to 39 age group should result in more travel, generally both nationally and internationally; more travel should occur

during the shoulder seasons due to the declining number of school-age children. The increasing number of people 65 years and over will necessitate the development of more services and facilities, including more packaged tours, tailored to this age group.

The percentage of the population in the work force will grow. Additionally, women will constitute a larger percentage of the work force. The work atmosphere results in more personal contacts; encourages people to travel, to do more. However, the difficulty in co-ordinating vacations among family members and friends will result in shorter, but more frequent, travel activities. Demand for simple, low cost, seasonal facilities will increase. An increased demand for resorts and catered vacations will also become more evident. There will be more separate vacations, on the part of husbands and wives, and an increased number of mini-vacations, of three to four days, without children.

Shifts in basic values will occur in the coming years. Individuality will be stressed, necessitating the provision of greater personal experience, socially, culturally and educationally, in tourism opportunities. This will result in a demand for a greater variety and quality of services.

There will also be an increased emphasis on aesthetic and environmental values, and a trend away from materialism. Outdoor recreation activities will become more popular, as well as cultural and historical attractions and events. There will also be a growing demand for these types of experiences in closer proximity to cities.

Knowledge, information and skills will be increasingly valued. Therefore, attractions and events which allow for the acquisition of knowledge and experience will increase in popularity.

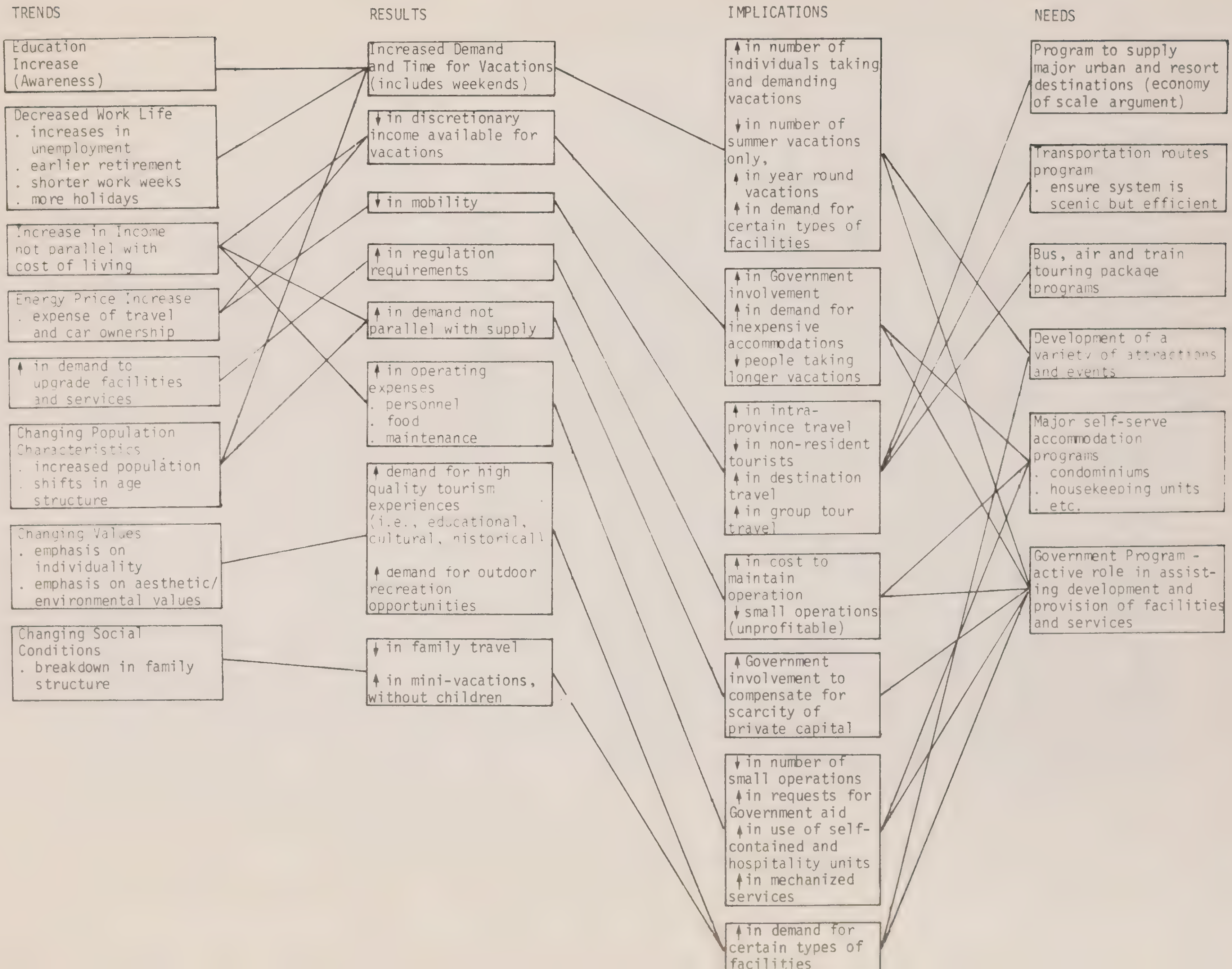
Some of these complex interactions in trends are shown in Figure III-8.

Some suggestions by the tourism industry which look to the future in different ways are:

1. providing a combination of attractions, events, accommodations and other services capable of sustaining the tourist's interests over a two or three week period;

2. large scale development of bus, air and rail touring packages to compensate for anticipated reductions in use of cars;

FUTURES: IMPLICATIONS FOR TOURISM DEVELOPMENT



increased emphasis on the development of publicly supported attractions and events planned in conjunction with the proposed 'attraction clusters'; and

3. the development of transportation corridors designed with the tourist in mind. These 'scenic routes' would be carefully planned for several modes of travel and provide necessary accommodation, food and information services at intervals along the route. In addition, given the expected increase in group travel, there will be pressure on the public sector to continue to develop and maintain an effective and efficient transportation infrastructure to better serve the tourist;

4. increased emphasis on the development of less expensive forms of vacation accommodation (trends seem to indicate an increasing demand for housekeeping units; although stress will still be on quality, the average vacationer will wish an alternative to constant dining-out on his longer vacation of the future).

CHAPTER IV

TOURISM ACTIVITIES: ANALYSIS AND SUGGESTED GUIDELINES FOR DEVELOPMENT

This chapter suggests the direction development should take for major tourism activities. Clearly, the suggestions are of critical interest to those seeking guidance concerning tourism development opportunities.

The logic followed to arrive at these development guidelines is outlined below:

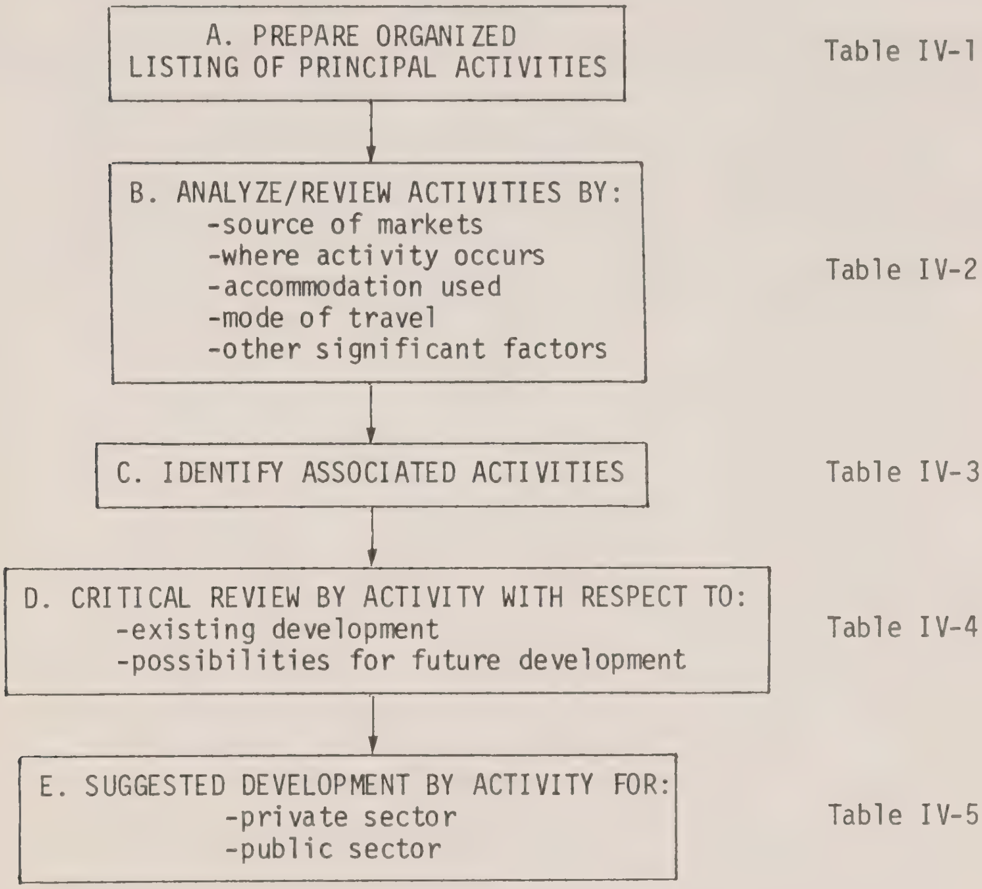


Figure IV-1 -- Procedure used in producing suggested development guidelines for major tourism activities

A. Identification of Specific Tourist Activities (Table IV-1)

In order to formulate development guidelines, it was necessary to develop an 'all inclusive' list of tourist activities which reflect consumer needs. An extensive review of studies which investigated participation in tourist activities was undertaken to produce a listing of activities.

The first step taken was to examine the many existing approaches to tourist market segmentation. While some of these proved useful in later study stages, none provided the definitive answers to tourism 'plant' development sought at this stage.

Utilizing existing studies and research data, together with the experience of the Tourism Marketing Branch, a list of 'activity type segments' was produced to describe the overall nature of the tourist activity. The 'activity type segments' were then broken down further to identify specific single element tourist activities which require individual attention when determining development needs.

TABLE IV-1

TOURIST TYPE SEGMENTS*

CATEGORY	SUB-CATEGORY	ACTIVITY SEGMENT	SPECIFIC TOURIST ACTIVITIES
SPECIALIST	Recreation	Boating	Large Sail Boats Cruiser Houseboat Canoes Outboard Casual
		Fishing	Trip-Lodge Trip-Wilderness Ice Casual
		Hunting	Trip-Big Game Trip-Wild Fowl Small Game
		Skiing	Downhill Cross-Country
		Other Outdoor Recreation	Nature-Based .snowmobiling .hiking .swimming Facility-Based .golfing .tennis .horseback riding
		Natural Attractions	General Niagara Falls
	Non-Recreation	Shopping Eating Out Special Events	
		Man-Made Attractions	Industrial Educational Entertainment/Amusement Historical/Theme
		Route Elsewhere	

continued . . .

*For definitions of terms refer to Appendix D

TABLE IV-1, continued

CATEGORY	SUB-CATEGORY	ACTIVITY SEGMENT	SPECIFIC TOURIST ACTIVITIES
DESTINATION PRE-DETERMINED	Business	Task	Route Task Single Task
		Event	Convention Small Meeting
	Second Residence	Lakeshore Upland Special Purpose	
	Visit Friends and Relatives	Passive Active	
LOCATION ORIENTED	Resort Visit	Resort Hotel Wilderness Special Purpose	
	Camping	Destination Wilderness Touring	
	Urban Experience		
TOURING	Tour Groups	Affinity Special Interest General	
	Auto Touring		

B. Activity Analysis -

Factors Considered (Table IV-2)

The factors for analysis were:

a. Consumption Patterns by Tourist Activity
   - ·Markets size by origin
   - ·Locations in the Province by economic regions
   - ·Accommodation used
   - ·Mode of Transport
   - ·Season
   - ·Length of Stay
   - ·Expenditures
   - ·Other significant factors (depending on activity)

This analysis assists in the process to identify opportunities for tourism development by:

1. Indicating the importance of the activity by area within the Province for use in the process of theming areas;
2. Identifying support services required (e.g., accommodation type) for future purposes of identifying development guidelines by activity; and
3. Assisting in identifying what activities can be packaged, based on support services required and season of occurrence, etc.

TABLE IV-2

CONSUMPTION PATTERNS BY TOURISM ACTIVITIES

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS*	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS--SEASON, LENGTH OF STAY, $
1. Boating	.largest Ontario market from Central Ontario (69% on weekends and 60% on vacation trips) .other substantial large Ontario origin groups are residents from Niagara, Lake Erie, Lake St. Clair and Northeastern Regions	.main location in Lake Ontario Region (34% on weekends and 30% on vacation trips) .other important boating areas are Georgian Bay, Northeastern and Eastern Regions	.private cottage is used most often (over 50%) with camping second (for Ontario resident)	Ontario resident (51% of weekend travellers use auto and 90% of vacation travellers) boats are also important on weekend trips	Ontario resident boats: Jan. - Mar. 0.38% Apr. - June 18% July - Sept. 80% Oct. - Dec. 2%
2. Fisning	.residents account for 67% of all fishing days (1970 data) .largest non-resident group--U.S.--largely from Michigan, Ohio, and New York .Central Ontario is the largest resident group	.highest percentage of residents visit the Lake Ontario Region (26.41%) .next most popular regions are Georgian Bay and Northeastern Ontario .fly-in fishing occurs in areas of Northeastern and Northwestern Ontario	.a private cottage is used most often by the Ontario resident (46% on weekends and 65% on vacation trips) .various forms of camping (i.e., tent, travel trailer, pickup camper) are often used as well	.the Ontario resident travels predominantly by car (93%)	Fishing by Ontario resident Jan. - Mar. 1% Apr. - June 20% July - Sept. 78% Oct. - Dec. 2% .in 1970, residents accounted for 64% ($200 million) of the expenditures and non-residents 36% ($114 million) .per angler-day expenditures in 1970 were $5.70 by residents and $20.80 by non-residents
3. Hunting	Moose: residents hunted 630,300 days, non-residents--121,900 days Deer: residents hunted 487,000 days, non-residents--23,600 days Bear: residents hunted 13,000 days, non-residents--62,200 days (1974)	.Moose hunting occurs largely in the Kirkland Lake, Thunder Bay, Chapleau and Geraldton Districts .Deer hunting mainly in Parry Sound, Bracebridge, Pembroke and Owen Sound Districts	.Ontario resident stays at private cottage (49% on weekends and 36% on vacation trips) 17% of Ontario hunters stay at residence of a friend or relative on weekend trips	.the car is used predominantly by Ontario residents (80-84%) .on vacation trips 8% travel by air	.Expenditures by hunters in Ontario are: Small game $50 million Deer $11 million Moose $20 million Bear $25 million (1974)

SOURCES: Ontario Angling Facts & Figures (Ministry of Natural Resources, 1970); Wildlife Branch, Ministry of Natural Resources, 1974 (Hunting); Ontario Recreation Survey 1973-74; U.S. Auto Exit Survey 1973-74; A Survey of Visitors to Ontario Government Travel Information Centres 1968, 1969 & 1970 (adjusted); Canadian Annual Vacation Pattern Survey 1974.

*Regions used are the Economic Regions indicated on Figure III-1

TABLE IV-2, continued

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS-- SEASON, LENGTH OF STAY, $
3. Hunting (continued)	Small Game: residents --3.3 million days, non-residents-- 58,000 days (above data from 1974) .resident hunters mainly from Central and Northeastern Regions. Also Niagara and Eastern Regions	.Bear hunting mainly in Chapleau, Kirkland Lake and Blind River Districts	.on vacation trips other types are used: pickup camper (15%), chalet/cabin (11%) tent trailer (9%)		.average per day expenditure higher for non-resident
4. Skiing	.mainly Ontario resident, some visitation from Michigan & Manitoba Alpine Skiing: residents largely from Central Ontario Region on weekends & vacations (75% & 64% respectively) Cross Country Skiing: 79% of resident market from Central Ontario, 14% from Niagara Region & 5% from Northwestern & Northeastern collectively	Alpine Skiing: Weekends-- 87% Georgian Bay 4% Lake Ontario Vacation 90% Georgian Bay Cross Country Skiing: Only on Weekends-- Few Vacation Trips 53% Georgian Bay 19% Lake Ontario 7% Northeastern	Alpine Skiing: Weekends-- 42% private cottage 26% home of friend or relative 12% private chalet Vacation 48% home of friend or relative 18% hotel/motel 17% private chalet Cross Country Skiing: 82% private cottage 15% home of friend or relative 3% private chalet	.predominantly auto --over 90% for both types of skiing	.mainly from late December to March .predominantly weekend activities
5. Other Outdoor Recreation	8% (659,631 vehicles) of the U.S. visitors to Ontario in 1973-74 (45% from Michigan, 24% from New York) 4% of other Canadians (53% from Quebec, 31% from Manitoba) .Ontario resident largest market group	.U.S. destinations were 39% Lake St. Clair 28% Niagara 8% Northeastern	.accommodation used varies by activities but is predominantly private cottage and home of friend or relative	.other Canadians travelled predominantly by car (56%)--other modes were air (25%) bus (9%)	.of the U.S. visitors 65% stayed 1 day 4% stayed 1 night 31% stayed more than 1 night .seasons of visitation by U.S. residents were Jan. - Mar. 4% Apr. - June 30% July - Sept. 53% Oct. - Dec. 13%

TABLE IV-2, continued

ACTIVITY	MARKETS	REGION WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS-- SEASON, LENGTH OF STAY, $
5. Other Outdoor Recreation (continued)					.average party expenditure for U.S. visitor was $147.12 (for overnight trips) .season varies by activity type (i.e., swimming in summer, snowmobiling in winter)
6. Viewing Natural Attractions	9% of U.S. visitors came to Ontario to see Niagara Falls (38% from New York, 16% from Ohio & 11% from Pennsylvania) .no data available on Ontario or other province's visitors .high percentage of overseas market travel to see Niagara Falls	.Niagara Region has highest visitation .other regions would be Eastern (Thousand Islands), Northeastern (Agawa Canyon)	.varies by location .high percentage stay at home of friend or relative	.predominantly private auto .bus and boat tours popular	.U.S. visitors expenditures $15.33/party for 1 day visit $112.90 for overnight visits 60% of U.S. visits were during the summer; 13% in the fall; 21% in the spring 65% of U.S. visitors stay less than 1 night, 20% stay 1 night and 15% more than 1 night
7. Shopping	5% (330,655 parties) of U.S. visitors in 1973-1974 5% of other Canadians in 1974 (46% Manitoba, 26% Quebec, 20% Alberta)	.U.S. visitors destinations were: 41% Lake St. Clair 33% Niagara 10% Eastern .main locations would be Windsor, Niagara Falls, Toronto, Sault Ste. Marie	.small percentage stay overnight .likely use motel/hotel	.predominantly private auto .other Canadians travel by car (47%), plane (29%) and train (20%)	.U.S. expenditures were $19.36/party for 1 day visits $185.91 for overnight visits 32% of U.S. shopping trip during the summer; 31% in the fall; 13% in winter; and 23% in the spring 99% of U.S. visitors stay less than 1 day .other Canadians trips were in the summer (36%) and fall (42%)
8. Eating Out	.very large market .largest market is the Ontario market (not a prime activity for large percentage of non-residents)	.major urban centres (Toronto, Ottawa, Niagara Falls, Sault Ste. Marie)	.usually does not involve an overnight stay	.car predominantly .train and bus to a lesser degree	.Year round .usually an evening

TABLE IV-2, continued

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS-- SEASON, LENGTH OF STAY, $
9. Special Events	[illegible]% (648,904) of U.S. parties (New York 58% Michigan 34%) 5% of other Canadians (Alberta 34%, Quebec 30%, & Sask. 19%) .Ontario residents attending an annually scheduled event came from Central (50%) Northeastern (18%) St. Clair (13%) Regions on weekend trips; and Eastern (25%) Lake Erie (23%) Northeastern (15%) St. Clair (13%) Regions on vacation trips	.U.S. visitation largely in Niagara Region (53%) and St. Clair Region (32%) .main destinations of Ont. residents on weekend trips were Metropolitan Toronto (49%) Georgian Bay (10%) Mid-western Regions (8%) and on vacation trips--Metropolitan Toronto (55%) Eastern (22%) and Niagara (8%) Regions	.Ontario resident stayed at home of friend or relative on both weekend (60%) and vacation (43%) trips .hotels/motels were also used frequently (vacation trips 11% and weekend trips 27%)	.predominantly car .other Canadians travelled by plane (56%) car (25%) train (15%) .Ontario resident travels by car most frequently (weekend 84% & vacation 94%); bus is also used often (9% on weekend trips)	.88% of U.S. visitors stay less than 1 day .U.S. expenditures were $35.91/party for 1 day and $133.72/party on overnight stays .U.S. visitation occurs in summer (49%) and spring (34%) mostly .other Canadians travelled mainly in the summer (47%) and spring (35%)
10. Visit Man-Made Attractions	(DATA ONLY AVAILABLE FOR ONTARIO RESIDENT)				
	Historic Sites: .largest markets on weekend trips are residents from Central (45%) St. Clair (14%) Niagara (9%) Regions and on vacation trips main markets are from Niagara (36%) St. Clair (31%) and Northeastern (12%) Regions	.destination regions with greatest visitation are Eastern (28%) Central (16%) and Georgian Bay (15%) on weekend trips and Eastern (33%) Northeastern (19%) Georgian Bay (18%) on vacation trips	.on weekend trips residents stay mostly at a home of a friend/relative (37%) or motel/hotel (35%) .vacation trip accommodation was private cottage (33%) home of friend/relative (16%) or private chalet/cabin (11%)	.a variety of modes are used on weekend trips (car 71%, bus 15% and rail 7%) .on vacation trips the car is used mostly 81%; bus 8%; and rail 4%	.short trip duration unless associated with other activities
	Museum/Art Gallery: .largest origin groups on weekend trips are from Central (32%) St. Clair (15%) and Niagara (15%) Regions	.areas with highest visitation on weekend trips are Central (37%) Eastern (32%) and Niagara (14%)	.most frequently used accommodation on both weekend and vacation trips are homes of friends/relatives (54% and 39% respectively)	.weekend trips modes used are car (66%) bus (16%) and rail (13%)	.visitation year round .usually 1 day unless other activities are participated in

TABLE IV-2, continued

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS--SEASON, LENGTH OF STAY, $
10. Visit Man-Made Attractions (continued)	.on vacation trips the largest groups are from the Central (36%) Niagara (16%) and North-eastern (13%) Regions	.main destinations on vacation trips are Georgian Bay (33%) Eastern (26%) and Niagara (17%) Regions	.motels/hotels are also used (weekends 32%, vacations 12%)	.increase in use of private auto on vacation trips (88%)	
	Zoo/Botanical Garden/ Nature Display or Tour: .the Central Ontario resident is the largest market group on both weekend (34%) and vacation (39%) trips .other large market groups are residents from the St. Clair and Niagara Regions	.areas with high visitation on weekend and vacation trips are the Georgian Bay (25% and 46%) and Niagara (20% and 17%) Regions	3 types of accommodation used most frequently on weekend trips are home of friend/relative (42%) hotel/motel (29%) and private (10%); while the 3 most popular on vacation trips are private cottage (40%) home of friend/relative (24%) and tent trailer (8%)	.on both weekend and vacation trips predominantly the car (91%and 90% respectively) .bus is also used frequently (5% on weekends and 7% on vacation trips)	.visitation primarily during summer
11. En Route Elsewhere	56,520 parties or .7% U.S. visitors in 1973-74 predominantly from Michigan (50%) and New York (27%) .large number of Ont. residents leaving the Province .other Canadians usually have Ontario as one of many destinations	.not applicable	.varies with trips (hotels/motels; home of friend/relative; tent/tent trailer, etc.)	.predominantly car .some bus and train	.usually do not stay overnight in province (82% of U.S. visitors stay less than 1 day) .expenditures by U.S. visitors $9.61/party for trip less than 1 day and $72.71/party if overnight stay
12. Business Task (Single or Route Task)	(LITTLE INFORMATION AVAILABLE FOR ONTARIO RESIDENT AND OTHER CANADIANS) 5% of U.S. visitors in 1973-74 (349,807 parties) mainly from Michigan (49%) and New York (38%)	.areas of visitation by U.S. resident are the St. Clair (43%) Niagara (22%) and Central (13%) Regions mainly	.predominantly hotel/ motor hotel/motel	.car is used most frequently .travel by air is also used quite often	.U.S. expenditures involving no overnight stay was $16.03/ party and $150.61/party on overnight trips

TABLE IV-2, continued

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS--SEASON, LENGTH OF STAY, $
12. Business Task (continued)		.Toronto and Ottawa are main destinations for residents and other Canadians			.visitation occurs relatively equally throughout the four seasons 83% of U.S. visitors stay less than 1 day
13. Business Event	.less than 1% of U.S. visitors visited Ont. (58,063 parties) mainly from Michigan (28%) Minnesota (23%) Ohio (15%) and New York (14%) .Ontario resident is largest market	.main destination of U.S. visitors in 1973-74 St. Clair (33%) Central (30%) and Northeastern (18%) Regions .destinations of residents and other Canadians Central (Toronto) and Eastern (Ottawa) Regions	.hotel/motel used most frequently .some use of resorts/lodges	.car used predominantly .air travel is used frequently	.U.S. visitation predominantly summer (46%) and spring (43%) 50% of U.S. trips are more than 2 nights .U.S. expenditures were $150.61 per party on trips involving an overnight stay
14. Second Residence	4% of U.S. visitors (316,692 vehicle parties) mainly from Michigan (28%) Minnesota (23%) Ohio (15%) and New York (14%) .Ontario resident is largest market	.U.S. destinations are Niagara (39%) St. Clair 26%) Eastern (11%) and Georgian Bay (10%) Regions .other Canadian's destinations are predominantly Northwestern and Eastern Regions .main cottaging areas for Ontario resident are in the Georgian Bay (52%) and Lake Ontario (21%) Regions	.own cottage	.private auto is the predominate mode of travel used	50% of U.S. visitors stay 6 nights or more and visitation is predominantly summer (56%) and spring (21%) .expenditures by U.S. visitors were $118.24/party
15. Visiting Friends/ Relatives	18.5% (1,454,237 parties) of U.S. visitors mostly from Michigan (50%) and New York (35%) 69% of other Canadians Que. (36%) B.C. (14%) Man. (13%) Alta./Sask. (17%) 43% of Ont. resident person visits	.destinations of U.S. visitors are St. Clair (42%) Niagara (29%) and Central Ontario (9%) .main destinations of other Canadians are Eastern and Central Ontario Regions	.stay at home of friend/relative most frequently	.other Canadians travel by car (44%) plane (43%) and train (8%) predominantly	65% of U.S. visitors stay less than 1 day .U.S. expenditures were $6.32/party on 1 day trips and $59 on trips with overnight stay .travel occurs relatively equally throughout the year

TABLE IV-2, continued

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS--SEASON, LENGTH OF STAY, $
16. Resort Vacation	3% of U.S. visits (243,159 parties) largely from Michigan (25%) New York (22%) Ohio (16%) and Pennsylvania (15%) 10% of other Canadian visits predominantly from Quebec (61%) and Manitoba (26%) .resident is largest origin group (27% of Ontario person visits)	.U.S. destinations are the Niagara (15%) Central (14%) St. Clair (3%) Lake Ontario (11%) Northeastern (11%) and Georgian Bay (10%) Regions .main destinations of Ont. residents are the Georgian Bay and Lake Ontario Regions	.resort/lodge	.private auto is used most frequently .other Canadians travel by auto (59%) plane (23%) and train (14%)	76% of U.S. visitors stay 6 days or more .U.S. travel is mainly in the summer (82%) .average U.S. expenditure is $190/party (overnight trip) 61% of other Canadian visitation is in the summer
17. Camping	24% of Ontario person visits with largest origin groups from Central Ontario (47%) Niagara (11%) St. Clair (10%) and Northeastern (9%) Regions on vacation trips 6% of all other Canadian's trips from Quebec (55%) and Manitoba (21%) predominantly	.main destination areas for the Ontario resident are Georgian Bay (34%) Northeastern (31%) and Eastern (9%) Regions on vacation trips .on weekend trips high percentage of camping occurs in the Lake Ontario Region (15%) as well	.Ontario resident uses a tent most frequently --other types (i.e., tent trailer, pickup camper, travel trailer) are used quite often	.private auto used most often .other Canadians travel by car (80%) and plane (8%)	.residents camp in the summer (87%) and spring (10%)
18. Urban Experience	.largest market group for this activity is the Ontario resident. .approximately 16% of trips to Ontario by other Canadians are for an urban experience. .largest origin groups for other Canadians are Sask (22%), Que. (21%) Alberta (18%) and Manitoba (17%)	.main destinations of U.S. visitors were the Lake St. Clair (34%) Central (31%) and Niagara (13%) Regions	.home of friend/relative or hotel/motel used most frequently	58% of other Canadians travelled by auto, 30% by plane and 6% by bus	56% of other Canadian visitation occurred in summer, 27% in the fall, 12% in the spring and 6% in winter .U.S. visitation occurred relatively equally throughout the year

TABLE IV-2, continued

ACTIVITY	MARKETS	REGIONS WHERE PARTICIPATION OCCURS	ACCOMMODATION USED	MODE OF TRANSPORT	OTHER CHARACTERISTICS--SEASON, LENGTH OF STAY, $
18. Urban Experience (continued)	5% of the U.S. visiting parties (371,352) originating from Michigan (37%) New York (32%) and Ohio (8%) predominantly	.main destinations of other Canadians were the Eastern, Central and Lake Erie Regions			58% of U.S. visitors stayed less than 1 day; 14% for 1 night; 27% for more than 1 night .average U.S. expenditures on overnight trips was $190.12
19. Touring Group and Auto	(USUALLY DISCUSSED SEPARATELY BUT DATA SOURCES USED DIDN'T DIFFERENTIATE BETWEEN THE TWO)				
	.almost 9% of U.S. visitor parties (685,647 vehicle parties) largely from Michigan (44%) and New York (23%) .approximately 14% of other Canadian person visits--from Manitoba (20%) Quebec (18%) Sask. (18%) and Alberta (16%) largely .the resident vacationer touring markets are largely from the Central (53%) Northeastern (11%) and St. Clair (9%) Regions	.Niagara Region (22%) and Lake St. Clair Region (33%) are main touring areas for U.S. visitors; Northeastern (12%) and Central (6%) Regions are also popular .most popular touring areas for other Canadians are the Eastern, Central and Niagara Regions .popular vacation touring areas for the resident are Georgian Bay (24%) Northeastern (23%) Lake Ontario (15%) and Eastern (14%) Regions	.varies .tour groups use hotels/resorts frequently .auto traveller uses hotel/motel or camping facilities, or home of friend/relative .Ontario residents on vacation trips use private cottages (41%) home of friend/relative (26%) private chalet/cabin (5%)	.predominantly car for individual touring .bus major tour group mode of travel	.average expenditure by U.S. overnight visiting party was $126.11 and $10.89 for trips with no overnight stay 72% of U.S. visitors stay less than 1 day .season of travel for U.S. visitors are summer (56%) fall (16%) winter (11%) and spring (17%) .other Canadians tour in the summer (66%) and spring (28%) predominantly

C. Associated Activities

Table IV-3 shows which secondary activities are frequently associated with a primary activity. This association helps to indicate which activities can be 'packaged' or amalgamated together so as to provide more 'complete' services to tourists to permit year-round operations and to generate additional income to operators/developers.

When individuals travel, one activity is often the prime motivational factor for taking the trip. Participation in other associated activities, however, frequently occurs e.g., eating out is often associated with going to the theatre . In order for these associated activities to be useful in the development process, it is important to understand how activities are grouped. The following factors are probably the most influential in determining the way activities are grouped:

1. the type of primary activity--whether it is outdoor-oriented; water-based; urban-oriented, etc.;
2. other activity opportunities available in the location of the primary activity;
3. the length of stay--whether there is time available to participate in both the primary activity and other associated activities;
4. the market demand for each activity.

Some examples of activity grouping are: those who participated in fishing also participated in boating, hunting, cottaging or camping and viewing natural features; and those who participated in hunting also participated in boating, fishing, recreational driving, hiking, viewing natural attractions and cottaging or camping.

It is evident from this investigation that some activities, such as cottaging, and some types of camping and resort vacationing often take on the characteristics of a residential setting, used as a base for participation in various activities. Other primary activities, in particular visiting friends or relatives and business (if it is a combination business and pleasure trip) may have any number of associated activities; often for these two cases, travellers will have a second primary activity (i.e., visiting friends or relatives and auto touring). This second primary activity, in turn, determines the associated activities.

Also apparent from Table IV-3 is that there are a number of activities (i.e., viewing a natural attraction, eating out and hiking/walking) which by their nature are associated activities for practically every primary tourist activity. Other activities, such as attending special events and visiting a man-made attraction, are also associated activities for a number of primary activities; however, their association is more dependent on whether or not opportunity for participation exists in the selected destination rather than the nature of the primary activity. This difference has been identified on Table IV-3.

TABLE IV-3. ASSOCIATED ACTIVITIES

PRIMARY ACTIVITIES	BOATING						FISHING				HUNTING			SKIING		OTHER OUTDOOR RECREATION								VIEWING ATTRAC.					VISIT MAN-MADE ATTRACTIONS				SECOND RESIDENCE			RESORT VACATION			CAMPING					
	Large Sailing Craft	Cruisers	Houseboats	Canoes/Tripping	Outboard Touring	Casual	Auto Access	Wilderness	Ice	Casual	Big Game	Wild Fowl	Small Game	Downhill	Cross-Country	Swimming Major Beaches	Hiking	Water-Skiing	Scuba Diving	Snowmobiling	Tennis	Horseback Riding	Golfing	General	Niagara Falls	Shopping	Eating Out	Special Events	Industrial	Educational	Amusement	Historical	Lakeshore	Upland	Special Purpose	Resort Hotel	Wilderness	Special Purpose	Destination	Wilderness	Touring	Urban Experience	Tour Groups	Touring Individual
Large Sailing Craft										●											▲		▲	●			●	▲			▲	▲										●		●
Cruiser										●						●			●		▲		▲	●		●	●	▲			▲	▲										●		●
Houseboats										●						●								●		●		▲			▲	▲												●
Canoe/Tripping								●		●							●							●																●				
Outboard Touring										●						●	●	●						●		●	●	▲			▲	▲									●			●
Casual Boating										●						●	●	●	●					●					▲	▲	▲	▲	●	●					●		●			●
Fishing (Auto Access)						●					▲	▲	▲				●							●			●	▲	▲	▲	▲	▲	●		●	●		●	●					
Fishing (Wilderness)						●					▲	▲	▲				●							●											●		●			●				
Ice Fishing																	●			●				●			●	▲					●		●			●						
Casual Fishing																●	●							●									●		●	●			●		●			●
Hunting Big Game						▲				▲		▲	▲				●			●				●				▲					●	●	●		●	●	●	●				
Hunting Wild Fowl						▲				▲			▲				●							●			●	▲	▲	▲	▲	▲	●	●	●		●	●	●					
Hunting Small Game						▲				▲		▲					●							●			●	▲	▲	▲	▲	▲	●	●	●			●	●					
Skiing Downhill																				●				●			●	▲	▲	▲	▲	▲	●	▲	●	●		●						
Skiing Cross-Country									▲								●			●				●			●	▲	▲	▲	▲	▲	●	●	●	●		●						
Swimming Major Beach						●				●							●	●			▲		▲											●					●					
Hiking																								●									●	●	●			●	●	●	●			
Water-skiing					●	●				●						●			●														●			●		●						
Scuba Diving					●	●				●														●			●						●		●				●					
Snowmobiling									▲					▲	●		●							●			●						●	●	●	●								
Tennis																							▲	●			●						▲	▲		●		▲	▲		▲			
Horseback Riding																								●									●	●		▲		▲	●					
Golfing																					▲						●						●	●		●		▲	●					
View Natural Attractions					●	●				●					●		●					▲					●						●	●		●	●	●	●	●	●		●	●

● HIGH FREQUENCY OF ASSOCIATION

▲ HIGH FREQUENCY - BUT MORE DEPENDENT ON AVAILABILITY OF OPPORTUNITY RATHER THAN NATURE OF PRIMARY ACTIVITY

TABLE IV-3. continued

ASSOCIATED ACTIVITIES

PRIMARY ACTIVITIES	BOATING: Large Sailing Craft	Cruisers	Houseboats	Canoes/Tripping	Outboard Touring	Casual	FISHING: Auto Access	Wilderness	Ice	Casual	HUNTING: Big Game	Wild Fowl	Small Game	SKIING: Downhill	Cross-Country	OTHER OUTDOOR RECREATION: Swimming Major Beaches	Hiking	Water-Skiing	Scuba Diving	Snowmobiling	Tennis	Horseback Riding	Golfing
View Niagara Falls																							
Shopping																							
Eating Out																							
Special Events																							
Industrial Attractions																							
Educational Attractions																							
Amusement Attractions																							
Historical Attractions																							
Business Route Task																					▲		▲
Business Single Task																							
Business Event-Conven.						▲				▲				▲	▲		▲				▲		▲
Second Res.-Lakeshore						●			●	●	▲	▲	▲	▲	●		●	●	●	●	▲	▲	▲
Second Res.-Upland						●			●	●	▲	▲	▲	▲	●	●	●	●		●	▲	▲	▲
Second Res.-Special Pur						●		●		●	●	●	●				●						
Visit Friends/Relatives	▲	▲	▲		▲	▲	▲		▲	▲		▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
Resort Vac.-Hotel						●				●				●	●		●	●		●	●	▲	●
Resort Vac.-Wilderness						●		●		●	●	●	●				●						
Resort Vac.-Special Pur						●	●	●	●	●	●	●	●				●			●			
Camping-Destination					●	●	●			●						●	●	●			▲	▲	▲
Camping-Wilderness				●		●		●		●	●	●	●				●						
Camping-Touring					●	●				●			●			●	●	●			▲	▲	▲
Urban Experience																							
Tour Groups																							
Auto Touring					●	●				●						●	●	●			▲	▲	▲

PRIMARY ACTIVITIES	VIEWING ATTRAC.: General	Niagara Falls	Shopping	Eating Out	Special Events	VISIT MAN-MADE ATTRACTIONS: Industrial	Educational	Amusement	Historical	SECOND RESIDENCES: Lakeshore	Upland	Special Purpose	RESORT VACATION: Resort Hotel	Wilderness	Special Purpose	CAMPING: Destination	Wilderness	Touring	Urban Experience	Tour Groups	Touring Individual
View Niagara Falls	●		●	●	▲	▲	▲	●	●									●	●	●	●
Shopping	▲			●	▲	▲	▲	▲	▲										●		
Eating Out			●		▲	▲	▲	●	▲										●		
Special Events	▲		●	●		▲	▲	●	▲	▲	▲	▲	▲		▲				●		
Industrial Attractions	▲			●			▲	▲	▲									●	●	●	●
Educational Attractions	▲			●		▲		▲	▲									●	●	●	●
Amusement Attractions	▲			●		▲	▲		▲									●	●	●	●
Historical Attractions	▲			●		▲	▲	▲										●	●	●	●
Business Route Task	●			●	▲	▲	▲	▲	▲										●		
Business Single Task	●			●															●		
Business Event-Conven.	●		▲	●	▲	▲	▲	▲	▲				▲						●		
Second Res.-Lakeshore	●		●	●	▲	▲	▲	▲	▲												
Second Res.-Upland	●		●	●	▲	▲	▲	▲	▲												
Second Res.-Special Pur	●			●	▲																
Visit Friends/Relatives	▲	▲	●	●	▲	▲	▲	▲	▲							▲		▲	▲		●
Resort Vac.-Hotel	●		●	●	▲	▲	▲	▲	▲										▲		
Resort Vac.-Wilderness	●																				
Resort Vac.-Special Pur	●			▲																	
Camping-Destination	●		●	●	▲	▲	▲	▲	▲												
Camping-Wilderness	●																				
Camping-Touring	●	●	●	●	▲	▲	▲	▲	▲										●		
Urban Experience			●	●	▲	●	●	●	●									●		●	●
Tour Groups	●	●	●	●	▲	●	●	●	●										●		
Auto Touring	●	●	●	●	▲	●	●	●	●									●	●		

Source: Ontario Recreation Survey, 1973-74.

D. Existing and Future Development Potential (Table IV-4)

An analysis of existing development serving each tourist activity was undertaken with the assistance of the Tourism Division, Ontario Ministry of Industry and Tourism. It was apparent from a comparison of consumer needs and existing development that:

1. there is a need for upgrading many facilities;
2. more public access to shorelines in 'developed' lakes and rivers is required;
3. certain areas in the Province are over-utilized;
4. many operations lack support services; and
5. many operations, as they presently exist, have limited market appeal.

This investigation, plus a consideration of trends in consumption patterns for tourist activities, suggested future market potential and type of development required.

TABLE IV-4

SUMMARY OF EXISTING DEVELOPMENT AND FUTURE POTENTIAL BY TOURISM ACTIVITIES

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
1. BOATING		
A. Large Sailing Craft	. Great Lakes provide excellent sailing site . mooring facilities close to capacity and provided mainly by private clubs . private clubs provide many on-shore services . commercial and public facilities lack high quality on-shore services, i.e., food services, access to accommodations and transportation	. specialized market which is relatively small but enthusiatic and wealthy . market would not support a mooring facility to service large sailing craft only . increasing market shift from higher income bracket into middle income bracket and a younger market (substitute for cottage) . pump out facilities (marina)
B. Cruisers	. development on larger inland waters and the Great Lakes system . mooring and docking facilities close to capacity . not enough winter storage facilities-close to capacity . marina services poor and lack on-shore services, (accommodation - lakeshore motels) . marinas in many cases poorly located, i.e., proximity to accommodation/restaurants, etc.	. small specialized market but enthusiastic and tend to be in higher income bracket . trend towards use as a second residence . skills required to manage cruisers limits rental market . fuel costs may reduce number of cruisers and possibly result in shift to sail crafts
C. Houseboats	. few good houseboat rentals (small operators) . few suppliers of houseboats . marinas not equipped to service houseboats	. alternative to second residence . potential rental market (lower operator skill required) . need for more houseboat manufacturers
D. Canoes/Canoe Tripping	. areas in relatively close proximity to urban centres becoming overcrowded . routes poorly mapped	. increasing market . rental and outfitting has potential . Northern Ontario potential for canoe tripping
E. Outboard Touring	. Southern Ontario public access to shoreline limited . where access is available other services i.e., accommodation/restaurants not available . lack of public launching ramps . lack of short-stay mooring facilities	. declining market - shift towards small convertible cruisers (18' - 20' range) . potential for more servicing operations (more sophisticated services needed) . potential for seasonal mooring areas - leaving smaller boats at area and travelling to area on weekends and for vacation

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
1. BOATING, Continued		
F. Casual	. public access to shoreline limited in Southern Ontario . provided by Provincial Parks where ramps are available . few locations where shoreline access and other on-shore services are developed in close proximity . casual boating largely related to cottaging	. large market but difficult to capture . need for more publicly available launching facilities and general access to waterways . potential for more servicing operations
2. FISHING		
A. Trip-Auto Access, Lodge Based	. few high quality fishing lodges . facilities do not provide services/recreational opportunities for the entire family	. increasing family market . potential in north - of interest to European market . fishing will be drawing factor to lodge but will not be primary activity . less interest in trophy fishing
B. Trip-Wilderness	. provided by fly-in camps/outposts . poor quality . problems with availability of guides . cost of fly-in camps not equal to the services and facilities provided . confronted with problem of seasonality	. small specialized market . fly-in trips of interest to both U.S. and Overseas markets . little potential for family market
C. Ice	. few areas in the province with the fish capacity for ice-fishing	. limited potential but could be promoted by year-round resorts/lodges offering other winter activities
D. Casual Fishing	. usually does not relate to any commercial facilities . limited public access to shorelines a problem . largely related to cottaging	. large market but difficult to capture through new development

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
3. HUNTING		
A. Trip-Big Game	. game supply adequate in remote areas . over-utilized in areas accessible by road . many of the hunting camps/lodges are poor quality . poor fly-in services . good quality resorts have good business . season too short	. relatively small specialized market - but market has high interest and willing to spend a lot . fly-in market greatest potential - especially European and U.S. markets
B. Trip-Wild Fowl	. few specialized resorts for water fowl hunting with exception of goose lodges	. limited potential for resorts/accommodation facilities to promote use during off-season . market largely Ontario resident
C. Small Game	. usually casual and does not relate to commercial facilities . day trip activity	. large potential for commercial shooting preserves near urban areas
4. SKIING		
A. Downhill	. hill development reasonable . few remaining good potential sites in Southern Ontario . increasing downhill skiing opportunities within urban centres (sanitary landfills) - day use activity . few apres ski opportunities	. intervening opportunities limit market to Ontario . Ontario market day or weekend trips . many Ontario skiers leave province for longer ski trips . potential for development of apres ski facilities (restaurants, lounges, some accommodation) . decreasing cost of equipment may increase market
B. Cross-Country	. existing trails good . little development around trails, i.e., food services . conflict for trail use with snowmobiles	. mainly Ontario resident - intervening opportunities for non-residents . increasing market but has local orientation . increasing popularity as a result of low initial expenditure and family orientation of activity . potential to develop 1 or more day trails through provision of longer routes and radial service points, i.e., accommodation, restaurants, resting huts

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
5. OTHER OUTDOOR RECREATION		
A. Nature Based		
i) Swimming (Major Beaches)	. swimming is largely an associated activity with i.e., cottaging, boating, etc. . exception would be major beaches i.e., Wasaga, Sauble, Grand Bend . major beaches in Southern Ontario used to capacity . development near major beaches low quality	. large market for day-use and weekend trips . potential markets are Ontario residents and neighbouring U.S. urban centres . potential for more public beaches in Southern Ontario within day-trip distance from urban centres
ii) Hiking	. trails good	. market large - but few specialized enthusiasts . for majority of market hiking is an associated activity . some potential for development of linear hiking trails with support services at node on trail (i.e., accommodation
iii) Water Skiing	. only large good quality resorts providing facilities for water skiing . numerous lakes in province capable for water-skiing . water skiing mostly associated with cottaging	
iv) Scuba Diving	. few facilities developed for scuba diving market . scuba diving largely occurs in Lake Huron/Georgian Bay and some deeper/clearer inland lakes . problem lack of information (areas and services not documented) . number of private clubs which take specialized trips	. small specialized market - not large enough to support specialized commercial development . potential for resorts to promote facility for scuba diving if resort has other resources to offer (to expand product line
v) Snowmobiling	. existing trails good . little development around trails, i.e., food services . problem with location control and safety regulations	. increasing market - however mainly resident . potential for snowmobile resorts where facilities already exist (largely promotional technique) and some upgrading i.e., winterizing accommodation

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
5. OTHER OUTDOOR RECREATION, continued		
B. Organized, Facility-oriented, commercial or club (i.e., tennis, horseback riding, golfing)	. provided by private club and some municipal involvement . few resorts offer such opportunities	. primarily day-trip activities . such activities could be used to extend season (possibly year-round if offered at resorts)
6. VIEWING NATURAL ATTRACTIONS		
A. General	. minimal development with exception of Niagara Falls, Thousand Islands and to a lesser degree the Agawa Canyon . little development in Northern Ontario in particular	. large market, however, usually short length of stay (few hours) and minimal expenditures . short trip duration may be attributed to lack of development at natural attraction sites . potential for development of scenic vistas and support services, i.e., food services, souvenir shops, near site and in keeping with scenic environment
B. Niagara Falls	. 'midway style' development not compatable with natural resource or international appeal of area . lack of accommodation at peak season	. large market appeal but short stay (few hours for large percentage) . does not require more development rather upgrading and control
7. SHOPPING	. Toronto basically only recognized centre . some smaller centres with strong ethnic/culture i.e., Kitchener Farmers Market	. as primary activity- small specialized market, however, as associated activity with other trip purposes very large . potential for development of quality gift shops and complexes where Ontario resident will support the investment (at the same time provide opportunities for tourist market)

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
8. EATING OUT	. good quality and variety available in urban centres . smaller centres lacking quality and variety . lack of information to assist travellers in locating known quality-medium priced restaurants outside of urban centres	. limited market for prime activity but market large when associated with other activities . potential for variety of catchy, theme type restaurants
9. SPECIAL EVENTS	. numerous events (sporting, ethnic, festivals/fairs) of local and regional appeal . few with provincial, national or international appeal . events tend to be of short duration (1 or 2 days) . location of events outside of Toronto and Ottawa generally do not have enough accommodation to support the visitation . problem of overcrowding and not enough support services (i.e., food services) during duration of event	. large potential market if properly developed and organized . potential to extend duration of event . co-ordination of timing of events would increase length of stay of visitor in an area or region
10. VISIT MAN-MADE ATTRACTIONS		
A. Industrial	. increasing number of industries offering plant tours . offered year round	. of particular interest to the Japanese market . trip duration usually 1 day unless associated with other activities in the area . potential to capture chartered bus tour market
B. Educational/ Cultural	. few educational man-made attractions in province, however, many attractions would be perceived both as educational and recreational (i.e., Ontario Science Centre, Planatarium, museums and art galleries) . most have 1 day visitation appeal	. large market potential - but dependent on scale of development . recent trend in interest in educational attractions increase market size

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
10. VISIT MAN-MADE ATTRACTIONS, continued C. Amusement	. entertainment attractions with provincial and possibly national appeal are found in two centres - Toronto and Ottawa . in other centres appeal is largely local or regional the exception being Stratford Festival Theatre	. market size varies with the type of entertainment . theatres or concerts with youth appeal relatively large . require large resident population thus should be located close to urban centres
D. Historical/Theme	. various degrees of development with the majority requiring a great deal of development to carry out theme to its entirety . tend to be viewing oriented rather than activity/participation oriented . few with on-site expenditure opportunities . outside of urban centres - short operating season	. potentially large market if development is good and is such that it encourages return visitation . potential to increase revenue through provision of on-site expenditure opportunities
11. EN ROUTE ELSEWHERE (Pass Through)	. majority of services and attractions are off main through routes . only on major routes are year-round basic services dependable . problem with lack of information on services (gas stations, restaurants and accommodation) and attractions off main routes	. large potential in terms of actual numbers . may benefit from this market by providing reason for stopping (both services and attractions)
12. BUSINESS TASK A. Route Task	. high quality accommodations and restaurants found in larger urban centres . outside of urban centres poor quality services and lack evening entertainment opportunities . relatively good road system	. difficult to increase market size but can encourage spending and extend length of stay through improved and variety of quality food services, accommodation and entertainment
B. Single Task	. refer to Route Task above	. usually short stay - likely maximum of overnight stay

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
13. BUSINESS EVENT		
A. Conventions	. facilities for large conventions available in Toronto, Ottawa and Thunder Bay . many other urban centres with convention capabilities on a smaller scale . recent trend for resorts to offer meeting facilities (largest with a capacity of 325) . smaller facilities lack supplementary services (i.e., cocktail lounges, pools, etc.) . outside of larger urban centres limited accessibility	. fluctuating market varying with economic climate . potential to increase spending and length of stay by providing recreational opportunities (promoting combination business/pleasure trips) . encourage wives to accompany . increasing interest in resort convention facilities
B. Small Meetings/ Retreat	. resort facilities available but problem of quality of facilities and services and a lack of information . increasing number of resorts getting into business to extend season but majority lack facilities and quality to make the operation feasible . in urban centres small meetings can be accommodated	. good potential market if opportunity provided . potential for development in areas within 1 to 2 hour drive from urban centres . market largely Ontario residents with some U.S. residents from bordering urban centres
14. SECOND RESIDENCE		
A. Lakeshore	. majority of Southern Ontario lakeshore developed and becoming overcrowded . development poor and uncontrolled because of the lack of by-laws . seasonal service centres developed to service second residences (i.e., Wasaga Beach, Grand Bend) low quality . increasing number of second residences being winterized . 'midway' type development evident in large second residence concentrations	. very large market . development of multiple dwellings becoming more apparent . opportunities available in Northern Ontario but problem of accessibility . rental market great potential
B. Upland	. increase trend as land becomes more scarce . row development back of lakeshore . problem of overcrowding . similar service centres as lakeshore second residences	. increasing market . will require more public beaches and mooring, docking and marina services than lakeshore residences

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
14. SECOND RESIDENCE, continued		
C. Special Purpose	. some development of ski chalets	. increasing market but relatively small . market group largely from higher income bracket . development should occur in areas where both summer and winter specialty activities may occur
15. VISITING FRIENDS/ RELATIVES		
A. Passive	. good transportation system especially in Southern Ontario	. market relatively small . no potential for development
B. Active	. good road system and support services in Southern Ontario . lack of attractions/recreational opportunities en route	. very large market - difficult to increase market size . potential to increase length of stay and increase expenditures by providing secondary activities
16. RESORT VACATION		
A. Resort Hotel	. many are of poor quality and require a lot of upgrading . American plan dying out . resorts tend to be distant from service centre and other attractions . many are small scale and do not offer the services and desired amenities	. potential for all market groups (European, U.S., Ontario resident) . market tends to be relatively large spenders . extending season with increasing interest in winter activities
B. Wilderness (Road Access)	. poor quality and lack recreational facilities and services . presently servicing fishing and hunting groups and provide little opportunity for family groups	. wilderness resort interest likely to increase . special interest expressed by European market . potential for development in Northern Ontario if accessible
C. Special Purpose	. few special purpose resorts in province	. market small but very keen and tend to spend more . increasing interest in tennis and concern for physical fitness may expand market and provide development opportunities

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
17. CAMPING A. Destination	. numerous campgrounds in province provided by both the public and private sectors . site locations too close together (may be desirable for some) . many private campgrounds poorly located, i.e., no direct access to waterfront . problem of overcrowding on weekends . many have not been profitable, however campgrounds, because of the type of development, no not encourage spending . many are located in areas where there are not any other attractions . a number of Ma and Pa operations who know little about campground operations	. large market but low return on investment if opportunities for expenditure are not provided . increase in use as second residence (i.e., setting up tent or parking trailer at one site for the season) . rental market - some potential . reservation system for porduct of known quality would aid
B. Wilderness	. only available in Northern Ontario . plans for a wilderness provincial park in South-eastern Ontario . problems with control of waste material and natural environment	. speciality market . relatively small market . rental market potential
C. Touring	. serviced largely by destination campgrounds . problem with location (either too close to highways or too far from travel route) . campgrounds developed without consideration of attractions in the area . on weekends, touring campers have difficulty in finding campsite	. may be shift from touring to destination because of rising fuel costs . market, however, will probably remain relatively large and tour in smaller area
18. URBAN EXPERIENCE	. larger centres (i.e., Toronto and Ottawa) most popular destination for this market group . good accommodation and food services available . variety of attractions provided . information re: transportation and location of attractions and activities a problem	. presently mainly adult market . potential to expand to family groups . market - big spender . large Japanese market interest . increased cost of fuel will likely limit touring travel and vacationers will go to areas where attractions are clustered which presently are in urban centres

continued . . .

TABLE IV-4, continued

ACTIVITY	EXISTING DEVELOPMENT	FUTURE POTENTIAL
19. TOUR GROUPS A. Affinity	. charter tours may be designed for affinity groups . approximately 30 tour companies in the province . many of the tours are 1 and 2 day trips but more longer tours being developed . most tours stop in Toronto or Ottawa where accommodation and food services are high quality and there are a number of attractions . lack of good accommodation and food services outside urban centres limit tour routes . increasing number of fly/drive tours	. market small (mostly senior citizen clubs and groups) . anticipated that an increasing number of vacationers will revert to packaged tours rather than private auto
B. Special Interest	. same as above . few tours (exception ski packages) developed for special interest groups	. potentially large market, especially 'controlled adventure' . individual groups small but enthusaistic . likely to be large spenders . locations will be dependent on area of interest . Europeans interested in Northern Ontario
C. General	. same as above	. large potential market . fuel costs decrease private car touring . more destination travel with general tours from area a possible trend
20. AUTO TOURING	. Southern Ontario road system and related services good . problem in Northern Ontario - highway services scarce and operating hours not dependable . areas in province where information services are lacking and existing information is fragmented . peak weekends during summer difficult to be assured of accommodation	. large market presently but may decrease as fuel costs and other travel related service costs rise . likely to travel shorter distances and stay in areas longer and fewer areas will be visited . potential to package area and areas for specific market segments (i.e., outdoor recreationalist) . location for development dependent on target market segment

E. Suggested Development (Table IV-5)

The analysis and evaluation outlined in Table IV-1 to IV-4, leads to a set of general development guidelines for each tourist activity. These guidelines are divided between the public and private sectors.

These guidelines will assist:

1. operators interested in expanding existing facilities or planning new facilities; and
2. in the development plans for preferential 'zones' in the Province.

TABLE IV-5

DEVELOPMENT GUIDELINES FOR TOURIST ACTIVITIES

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
1. BOATING	. best overall service can be provided by marinas in small urban centres . encourage diversification of marina operations . marina site location should be close to on-shore services (accommodation, restaurants and other food services, attractions) . marinas should have pump-out facilities and high calibre fueling facilities . auto parking facilities should be available near marinas . lakeshore accommodations should provide boat parking facilities	. increase docking/mooring facilities . provide more storage facilities . improve and diversify marina services and facilities . provide on-shore accommodation near marinas on large water bodies and canal systems . develop attractions and restaurants near marinas . require more manufacturers and rental operations of houseboats . more outfitters required in Northern Ontario to service canoe trippers Large Sailing Craft: . organized sailing clubs with on-shore facilities for socializing . rental and sailing lessons . sailing tours Cruisers: . rentals . lessons . boat tours Outboard Touring: . rental	. develop boat touring routes . provide information to developers and boaters . provide boat ramps and public access to lakeshore for casual boaters . provide marina services in provincial parks where applicable . route markings of waterways . public docks and ramps . boating regattas and events

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
2. FISHING	Lodge Based: . encourage diversity of compatible activities offered (boating, swimming, etc.) . site location should produce an isolated atmosphere . facilities should be developed to carry out an outdoor theme (i.e., log cabins) . should be located relatively close to a service centre for services and entertainment . support services should be provided at lodge such as washing machines/dryers and evening entertainment	. improve and upgrade existing facilities to encourage family participation . boat and equipment rental	. stocking, management, rehabilitation of areas under heavy pressure . fishing regulations . co-ordinate commercial tourism development and Ministry of Natural Resources
	Wilderness: . fly-in camps and outposts should be of good quality but in keeping with environment . good guides and equipment (rental) . trip should be packaged . package product line with hunting and boating . should have a base lodge at trip origin	. upgrade existing accommodation facilities . improve fly-in services . co-operate with accommodation operators at location of trip origin for use as base lodge	. same as above . outpost camp regulations . provide access to fishing areas in Northern Ontario
3. HUNTING	Big Game: Moose - same as wilderness fishing described above Bear - same as fishing lodge-based Deer - same as fishing lodge-based	. upgrade and diversification of facilities from single purpose . provide travel service	. increase road and airport infrastructure in Northern Ontario where feasible . hunting regulations . wildlife management areas . information . licencing
	Wild Fowl and Small Game: . resorts/lodges should not be developed to service this market group only - provides an opportunity to expand existing resorts product line and to extend operating season . goose camps some potential . refer to Resort Vacation #16		

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT COMMERCIAL	SUGGESTED PRODUCT DEVELOPMENT NON-COMMERCIAL (PUBLIC)
4. SKIING	Downhill: . ski resort should carry out theme to its entirety . apres ski services should be of good quality (i.e., entertainment, eating, drinking, dancing) . opportunities for other winter activities (i.e., snowshoeing, cross country skiing and possibly snowmobiling) should also be provided . accommodation should be provided on site or close to site . should be developed in areas which are also summer vacation areas	. more apres ski services required . develop mass transit systems to avoid winter driving	. locate winter sports facilities (i.e., bobsled runs) adjacent to existing downhill areas
	Cross-Country: . resorts should be developed in keeping with a winter/outdoor atmosphere/theme . trails should be well marked and groomed . good quality accommodation and restaurants . resting huts provided along routes . resorts should also service summer tourist market	. co-operate with other resorts where trails can be linked and overnight trips may stay at resorts along the trail	. link trails together to develop long routes and radial service points

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
5. OTHER OUTDOOR RECREATION	Nature Based: Major Swimming Beaches - . quality accommodation/urban resort atmosphere should be provided . other water activities, i.e., boating should not be permitted in the area . adequate washroom facilities should be provided . parking snould be located back from waterfront	. activities may be provided by resorts/accommodation facilities to expand product line and extend operating season . in close proximity to major beaches good quality, urban atmosphere resort complexes	. provide more beach areas (especially in Southern Ontario)
	Hiking - . trails should be marked (distance should also be noted) . located in areas away from other development and have scenic vistas and variety of plant and wildlife . trails should be circular so that the hiker does not return along same route . sensitive (environmentally) should be marked and protected (i.e., board walks) . linked with accommodation	. where hiking trails exist or have potential - resort operators should co-operate to provide linked accommodation along trails . resorts should encourage snowmobile weekends and vacations in areas where trails are developed or there is potential for trail development	. information . development and grooming of trails
	Water Skiing - . not applicable		
	Scuba Diving - . areas should be well marked . tank services provided close to scuba diving areas		. information
	Snowmobiling - . trails should be marked and controlled . resting areas provided . trails should be located in areas which will not interfer with other activities . accommodation/apres snowmobiling		. events/competitions . development and grooming of trails

continued . . .

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
5. OTHER OUTDOOR RECREATION, continued	Organized Facility Oriented, Commercial or Club, i.e., tennis, horseback riding, golfing, etc. - . opportunity lies in development of self-contained facilities i.e., food services, accommodation, activity related facilities . should be developed to enable year-round use - where activities can not function year-round - facilities for other activities should be developed . facilities should be developed along a theme (related to activities) . complementary activities should also be available on-site, i.e., tennis and swimming or golfing and curling	. specialized resorts . special events/competitions . lessons . rental . pro shops/specialized shops	
6. VIEWING NATURAL ATTRACTIONS	. any development must be sensitive to the environment . natural feature should be protected . facilities/structures should be designed to compliment the natural feature . viewing areas should be provided . parking areas should be located away from viewing area and natural features	. restaurants/food services of good quality and variety . develop accommodation in peripheral area . sightseeing hours may be developed where natural feature has large appeal . specialty shopping	. provide access for natural feature . control development and use/activities . provide scenic vistas
NIAGARA FALLS	. any development should be high quality . 'midway' type development undesirable	. improve quality of food services . develop accommodation in peripheral area	. control development and encourage upgrading of accommodations, food services and secondary attractions in the area . promote activities outside of core area - move people out of core area

continued . . .

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
7. SHOPPING	. locate where other attractions exist . where resident market will support shops as well . specialty gift shops should be developed with a theme . combination of manufacturing and selling goods (i.e., Blue Mountain Pottery)	. quality gift stores and complexes to take advantage of existing traffic . gift and souvenir shops near departure points (i.e., terminals) . develop shopping tours . specialty crafts . better information services	. tourist communities should be encouraged to develop store front theme (cultural/historical)
8. EATING OUT	. restaurants should be theme developed . restaurants associated with an attraction should carry out theme of the attraction . located near population which will support it year-round . should be developed to appeal to a broad market	. quality restaurants associated with natural attraction or man-made attraction . ethnic restaurants developed in ethnic communities . medium priced chains of known quality and offering variety	. information . rating system
9. SPECIAL EVENTS	. located where existing support services (accommodation/food services) will support special event . theme of event carried out to its entirety . facilities required for special event should already exist . if special facilities/structures required for event - alternative uses should be made of them	. should not develop for special event . should encourage development of special events during seasons of low occupancy . modifications should be made to existing plant (accommodation and restaurant services) to carry out theme of special event	. monitor existing events and support those with wide potential . provide management assistance

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
10. VISIT MAN-MADE ATTRACTIONS	Industrial: . tours should be planned and monitored . tours should be participation oriented . distribution of samples encouraged if practical Educational: . attraction should be activity-oriented rather than viewing-oriented . constant change of features to encourage return visitation . opportunities for expenditure provided on site (i.e., restaurants/gifts and souvenir shops)	. development of accommodation and food services near attractions . gift and souvenir shops near attractions . provide on-site expenditure opportunities . development of secondary attractions near major attraction to complement	. develop attractions which are not commercially feasible . make private sector aware of development opportunities . provide access to
	Amusement: . should operate year-round . theme development (which determines type of entertainment) where practical . should appeal to all age groups . should be activity-oriented . food services and accommodation should be available and developed along theme of entertainment Historical/Theme: . should be activity-oriented . theme should be carried out to its entirety . either changing displays or events or activity oriented to encourage repeat visitation . opportunities for expenditures available on-site . should be developed to operate year-round	. provide food services, accommodation and other related services close to attractions . development of attractions in areas where related services are available	. public transit systems to man-made attractions where feasible . information . identify development opportunities

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
11. EN ROUTE ELSEWHERE	. food and fuel services developed along major through routes . medium priced/good quality accommodation near highways but where other attractions primarily support the operation . develop scenic routes/vistas . provide roadside picnic areas . directions to attractions off main route clearly marked	. food and fuel services . development should occur only along highways with traffic volume to justify development . bus carriers and possibly trains should be encouraged to stop en route at attractions	. road markings . scenic vistas . roadside resting areas . route information - detailing services and attractions . access routes to attractions from main through route
12. BUSINESS TASK	. accommodations should be of high quality and provide quality food services . recreational services such as swimming pool and evening entertainment where commercial market is large . information of attractions and other services in area should be provided . located in service nodes	. accommodation and restaurants outside of major urban centres should be upgraded to service this market . operators outside major urban centres where it is not feasible to provide evening entertainment should inform business visitor of opportunities available in the community . more related activity opportunities within accommodation facilities	. informal local 'host' business of events, food/entertainment and attractions available . rating system of both accommodation and restaurants

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
13. BUSINESS EVENT	Conventions/Urban: . accommodation facilities should be high quality and should be developed along a theme . services provided within facilities include: restaurants, cocktail lounge, evening entertainment, recreational facilities (i.e., saunas. swimming pool, exercise pool), barber shop, beauty salon, gift shop . provide information for accompanying wives . bus service from airports . internal transportation system should be accessible . meeting rooms of various sizes for large gatherings and smaller seminars . located close to shopping areas and attractions	. for large conventions hotels should co-operate to provide services and accommodate number . hotels should encourage co-operation with car rental agencies, local sightseeing tour operators and other guest services . activity packages for spouse	. where feasible assist in development of large convention centre . marketing assistance
	Conventions/Resorts . should be relatively accessible by air . resort should be self-contained including: meeting rooms (large, small seminars) quality restaurant(s), recreational opportunities (both indoor and outdoor), evening entertainment, and cocktail lounge . developed along a theme . should be adaptable to support both commercial and recreational visitor . packages should be available for spouse . preferable to have attractions in the area	. upgrading of existing accommodation facilities	. marketing assistance

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT COMMERCIAL	SUGGESTED PRODUCT DEVELOPMENT NON-COMMERCIAL (PUBLIC)
13. BUSINESS EVENT, continued	Small Meetings/Retreats: . provision of small meeting room facilities in a non-urban environment . accommodation facilities should include quality restaurants and evening entertainment . should be located within 1 to 2 hour driving distance from urban centres	. upgrading of existing accommodation facilities	. marketing assistance
14. SECOND RESIDENCE	Lakeshore: . scarcity of land in Southern Ontario requires development of multiple units . units should be developed to carry out outdoor atmosphere . landscaping very important Upland: . development should occur in areas where readily available to water resources and related services exist, i.e., marinas, public beaches or developer should purchase beach property for residents . area should offer year-round opportunities Special Purpose: . development should carry out theme . area should offer year round opportunities	. development of multiple units . marina development in areas with upland second residences	. control development
15. VISITING FRIENDS/ RELATIVES	Not applicable		

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
16. RESORT VACATION	Resort Hotel: . should be located in a natural landscape of high quality but have access to service centres and attractions that offer off-site recreational opportunities . must be relatively large scale, self-contained operation in order to offer the range and quality of services and activities required to satisfy the market . component units of accommodation, food service, and activities could be separated to allow servicing of different market segments and seasonal demand . shoulder season and winter activities should be developed to make these year-round operations . among the available services and facilities should be food services, licenced lounge, entertainment and facilities for facility-oriented recreation (e.g., golf, tennis, swimming pool and riding, hiking, skiing trails) . could package exchange visits with neighbouring resorts for dining, entertainment, use of recreation facilities, competitions . multiple unit accommodation, resort-camping mixes should be discouraged	. upgrade existing resort facilities and expand operations . develop winter season opportunities . bring in entertainment . co-operate with neighbouring resort owners to arrange exchange visits/tournaments	. promote "complex-recreation community" concept . aid in trail development . provide design and development guidelines booklet to assist private entrepreneur in upgrading or developing resorts

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT COMMERCIAL	SUGGESTED PRODUCT DEVELOPMENT NON-COMMERCIAL (PUBLIC)
16. RESORT VACATION, continued	Wilderness: . should be located in a wilderness setting . should have the support facilities/ services required by families . need to have well-rounded selection of wilderness-related activities available . should be within reasonable proximity to service nodes . where accessible during winter months - winter operation should be developed . should have choice of food services or housekeeping units . resort and camping mixes should be discouraged or the site plan development must be extremely sensitive to needs of both types of clientele and to added pressures on facilities	. upgrade quality of services and facilities at existing resorts . increase unorganized wilderness-related activities . develop resort's ability to support family visitation by providing required support facilities/ services . upgrade hunting and fishing lodges to become resorts that have wider appeal . could, in co-operation with neighbouring resort owners, develop indoor/outdoor recreation complex central to the resorts . develop winter operations where feasible	. encourage existing lodges to upgrade and promote for this market . encourage co-operation and co-operative development of recreation facilities by neighbouring operators . encourage operators to specialize - not to mix resorts and camping . provide design and development guideline booklet to aid operator/developer in upgrading or developing new resorts
	Special Purpose: . should be situated in pleasant natural environment . should be developed for purposes other than hockey (i.e., golf, tennis, health, sailing) . should be totally self-contained, offering all services/facilities needed to support a particular activity - total theme development . should offer indoor training facilities that have potential for winter use . could change specialty focus with season where applicable . utilize existing resort facilities to develop special use facilities . must be relatively large operations in most cases	. develop and expand existing resort facilities to capture special use market . develop year-round operations where applicable develop for purposes such as golf, tennis, health, sailing, canoeing, music . develop total theme including appropriate food services	. assist operators in identifying, developing for, and promoting to special purpose target markets . provide design and development guideline booklets to assist entrepreneur in upgrading or developing

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT: COMMERCIAL	SUGGESTED PRODUCT DEVELOPMENT: NON-COMMERCIAL (PUBLIC)
17. CAMPING, continued	Wilderness: . designation of land rather than development	. make lodge, resort or camping area the base camp for wilderness campers . offer guided wilderness camping trip and provide outfitting services . provide fly-in services to remote areas . develop outpost camps and take responsibility for waste collection at these sites	. designate areas for wilderness camping and inform campers . take responsibility for waste collection on public land . offer courses or seminars to public on wilderness camping
	Touring: . locate sites in proximity to major highways but not right along roadside . develop in area with good access to attractions . essential services and on a <u>small</u> scale food services, shopping facilities for groceries, household items and souvenirs; recreational facilities should be supplied . sites should be designed for trailers and motor homes as well as tent trailers and tents	. develop facilities near cities for touring . upgrade existing roadside campgrounds and expand services and facilities . develop campgrounds in better locations with reference to travel routes and attractions . provide information about attractions and events in the surrounding area	. develop overnight stopover camping areas away from road in areas where traffic volume does not make private investment feasible <u>but</u> where some need occurs (e.g., northwestern Ontario) . provide information to the touring camper about location of campgrounds near major attractions and urban centres
18. URBAN EXPERIENCE	. can be best developed in larger cities where the indigenous population can support the quality and diversity of facilities and services are needed . require good quality and diversity of attractions, events, entertainment, shopping, food services and accommodation . need specialty shops and restaurants . need efficient internal transportation network	. develop specialty shops and restaurants . offer tour packages . develop a good cross-section of accommodation . provide entertainment (family activities as well) . in co-operation with one another develop theme for a downtown area or plaza	. support improvement of urban core . help to subsidize some attractions and events particularly historical and cultural . disseminate information/directions about attractions/events and support facilities and services

continued . . .

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
19. TOURS	Group: . develop tours around themes and include areas where there are concentrations of attractions and support services . tours require at least one major attraction/event per day . choose routes which are scenic and easily accessible to side attractions	. develop longer tours . develop special interest tours . upgrade support services especially accommodation and food services outside of urban centres and along tour routes . develop winter tours . develop tours that penetrate further into Northern Ontario . develop tours to appeal to younger people and families . work with outside tour operators to bring people to Ontario . link provincial tours into local tours where possible	. encourage development of theme activity nodes of sufficient size to require overnight stop . encourage more professional training of tour guides . open up northland by rail and bus . place more control on tour franchise regulations . bring tours into Ontario
	Individual: . not applicable	. transportation carriers - devise packages to include reservations, permission to get on and off train at special rate, information services . develop activity nodes (attractions/events/support services) . base product development on themes and linear corridor themes . provide rent packages for overseas (fly-drive) . rental services for motor homes, trailers and camping equipment	. en route information/direction services . upgrading and signing of roads where feasible . develop secondary road tour routes

TABLE IV-5, continued

ACTIVITY	GENERAL DEVELOPMENT GUIDELINES	SUGGESTED PRODUCT DEVELOPMENT	
		COMMERCIAL	NON-COMMERCIAL (PUBLIC)
17. CAMPING	Destination: . should be located in pleasant natural landscape that can support relatively intensive use . generally waterfront access is desirable . should be in proximity to other attractions and service centres where possible . site design must be sensitive to nature of camping experience sought (social camper, outdoor camper, alternative to a summer home, tenting, trailering, motor homes) - each needs specific types of facilities, services, environment . destination camping area should specialize in providing camping experience most likely to succeed in view of the area's geographic location and environmental setting - catering to mixed clientele is usually unsuccessful . should provide on-site support services facilities (e.g., waste disposal, showers, laundry, food services, marina services, canoe rental, supply and souvenir shop, entertainment, fireplace) and recreational opportunities . should provide shelter for indoor activities during poor weather conditions . should have a reservation system in view of weekend crowding problems . operations need to be larger than most of those which currently exist	. expand and improve facilities and services at existing campgrounds . landscaping and design work in existing and developing camping areas to suit needs of clientele . develop recreation opportunities for all ages and particularly for use in poor weather conditions -may be a joint venture with other entrepreneurs . develop relatively large scale operations with food services, marina, rental and store facilities make operation profitable . develop reservation system perhaps in conjunction with public agencies to deal with demands, especially at peak periods and to avoid poor receptions for visitors . carry out studies in conjunction with public agencies to learn more about requirements of destination camper . provide camping accommodation for provincial park visitors where no camping is permitted in park . provide rental of tents, trailers and other camping equipment	. provide camping for outdoor camper who requires and looks for only the basic services and facilities (parks), unorganized recreation and interpretation programs . aid in research on destination campers and provide design and development guidelines or booklets for campground development . develop reservation system

continued . . .

CHAPTER V

GENERAL DEVELOPMENT GUIDELINES

This Chapter presents general guidelines that must be considered for all tourism development. They are derived first, from consideration of the Provincial government's policies, and second, from a consideration of sound business principles for the private investor.

A. Overall Provincial Guidelines (Tables V-1 to V-5)

PRINCIPLES

1. Tourism development must recognize major policies of the Province and their implications for tourism; it must be carried out in the context of accepted Provincial planning and development strategies and priorities.
2. The economic, social and environmental impacts of proposed tourism developments must be identified and assessed, and development strategies designed to optimize these impacts.

1. Major Policies of the Province (Table V-1)

This 'tourism development framework' for Ontario has been prepared to represent an essential component of overall schemes for improvement of the economic and social milieu. It has been developed within the context provided by other Provincial scale planning activities, both comprehensive (e.g., Design for Development, Strategic Land Use Plans) and sectoral (e.g., transportation planning).

Tourism development must be dealt with in the context provided by general policy directions of the Provincial government. Particular attention must be paid to the 'Design for Development' documents as published by the Ministry of Treasury Economics and Intergovernmental Affairs. Careful review of documentation prepared over the past decade reveals that the Province is attempting to deal with several large issues; Table V-1 summarizes the policy directions that have emerged as well as their implications for tourism.

The stated directions should not be viewed as having absolute veto power over emerging tourism development concepts and strategies. However, the tourism developer, public or private, is well advised to be cognizant of overall planning and development directions; they reflect a sincere attempt to determine what is best for Ontario and support for complementary development schemes is implied.

TABLE V-1

MAJOR POLICY ISSUES FACING ONTARIO - IMPLICATIONS FOR TOURISM

POLICY ISSUE	APPARENT POLICY DIRECTIONS	IMPLICATIONS FOR TOURISM
I 'Structured deconcentration' of settlement and urban development. That is, the diversion of a certain amount of growth from areas of present heavy concentration to a predetermined set of urban centres across the Province.	.to encourage decentralization from Metropolitan Toronto area. However, the Metropolitan Toronto area will continue to grow rapidly. .to encourage growth and orderly development in five major regional sub-systems, focussing on Toronto, Ottawa-Kingston, London, Thunder Bay and Northeastern Ontario (likely Sudbury). .sub-regional service centres at Windsor, Kitchener-Waterloo-Cambridge, Hamilton, an urban centre in Haldiman-Norfolk, St. Catherines-Welland-Niagara Falls, Oshawa, Barrie, Belleville, Cornwall, North Bay, Timmins and Sault Ste. Marie. .the provision of transportation facilities and services will be used deliberately to foster growth of the system and to aid in economic growth. .to expand and build upon existing communities rather than create new centres of development.	.designated urban growth nodes already serve as tourism service centres. .private investors recognize advantages of locating near large or expanding urban centres to take advantage of base markets (residents and business travellers) and for access to needed support services (stable labour pool, infrastructure, laundries, etc.). .if service centres are located in designated tourism development zones, public and private investment in tourism can provide recreation/tourism opportunities for the resident and non-resident market and help strengthen and diversify the economic base of the community.

continued . . .

TABLE V-1, continued

POLICY ISSUE	APPARENT POLICY DIRECTIONS	IMPLICATIONS FOR TOURISM
II Reduction of regional disparities--stimulate economic development and diversification in areas of slow growth or economic instability.	.to fully utilize provincial government resources to achieve orderly growth in, and optimal development of, the resources of Northern and Eastern Ontario. .to diversify the range of industrial activities to improve economic stability. .to produce goods and services regionally which would otherwise come from outside the region. .to encourage the clustering of industrial growth. .to locate resource-processing activities near the resource.	.tourism, like most other industries, has potential for decreasing regional disparity. Caution must be exercised as to the type of tourism development utilized. Because of distance to markets and the limited variety of existing plant, significantly increasing visitation (and spending) in the North and East will be a slow, expensive process. .additional development should orient around resource-based activities, and should be carefully scaled to allow for expansion as the market expands. The record of single, large scale developments in similar areas has been dismal.* .from an industry perspective (private) the 'risk' associated with tourism development increases as one locates further from the southern Ontario market, specifically COLUC and Ottawa (problems associated with seasonality, manpower, availability of funding, small base market).

.as current plant development is weak or non-existent in economically deprived areas the scale of investment required to significantly alter the market mix is extremely high.

.only certain types of tourism development can provide 'good' employment opportunities and high economic return to the 'primary impact area' with acceptable social and environmental consequences. (see Table V-2)

.public investment in tourism development in North and East should probably focus on urban centres and in assisting current operators to diversify and upgrade. Any new development should be clustered, preferably with current plant, leading to the creation of 'destination zones'.

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*See Canadian Council on Rural Development. Economic Significance of Tourism and Outdoor Recreation for Rural Development. (Ottawa, 1975).

continued . . .

TABLE V-1, continued

POLICY ISSUE	APPARENT POLICY DIRECTIONS	IMPLICATIONS FOR TOURISM
III Response to growing pressures for recreation/tourism resources and facilities while protecting natural resources and maintaining environmental quality.	.recognition that all residents should have sufficient and equitable opportunity to satisfy their leisure needs. .to assign priority to public use and recreation development in areas of high recreational capability and accessibility. .to provide a greater variety of opportunities in and near major urban centres. .to manage forest cover wherever appropriate for production, conservation, recreation, wildlife habitat, farm income and landscape enhancement. .to protect 'sensitive areas' from over-utilization. .to create and maintain public access to and through key recreational areas, such as lakeshores and scenic uplands (priority assigned to the shorelines of the Great Lakes, Lake Simcoe, inland lake districts, and the Niagara Escarpment).	.require closer communication between public and private suppliers providing tourism/recreation opportunities. .whenever possible, tourism development projects should offer opportunities for day-users as well as those who stay for longer periods. .tourism development should be discouraged in those areas designated 'sensitive' to that kind of development by the Ministry of Natural Resources. .as lakeshore property for second residences is developed in existing recreational areas, the commercial sector will respond with high-density rental and seasonal lease accommodation. .tourism 'destination zones' and connecting corridors should be sympathetic to the recreational needs of the regional population.
	.to encourage the private sector to play a dynamic and effective role in providing recreation and tourist facilities. .to enhance the recreation/tourism industry's economic viability and its income and employment benefits. .provincial government intends to plan a system of recreational areas and linear connections to serve the urban population of south-central Ontario (e.g., Ministry of Natural Resource's 'near urban parks').	

continued . . .

TABLE V-1, continued

POLICY ISSUE	APPARENT POLICY DIRECTIONS	IMPLICATIONS FOR TOURISM
IV Allocation of resources in order to achieve a reasonable balance between benefits gained from export tourism (import of non-Ontario visitors and expenditure) and those recreation/tourism benefits accruing to the Provincial resident.	ONTARIO MINISTRY OF INDUSTRY AND TOURISM TARGETS: .to encourage Ontario resident to spend leisure and vacation time in Ontario. ONTARIO MINISTRY OF NATURAL RESOURCES .ANGLING - to meet all of the anticipated demand for angling in Northern Ontario (50% of demand is from residents) and two-thirds of the anticipated demand in Southern Ontario (30% of demand is from residents). .WILDLIFE - for Ontario residents there will be a significant increase in wildlife viewing mainly through interpretive programs in the southern regions (about 13% of population participates) and status quo of hunting throughout the province will be maintained. (Note: slight decrease in central Ontario and slight increase in S.W. and S.E. Ontario) - there will be a slight increase in non-resident tourism benefits ($ earned) associated with hunting (particularly in N.W. and N.E. Ontario) - crown land cottage lots to be available only to Ontario residents .PROVINCIAL PARKS - focus upon servicing the day-use recreation needs of Ontario's urban populations.	.from the industry perspective the origin of the consumer/client is relatively unimportant. .top priority should, therefore, be given to those projects and locations that optimize all available markets. .where a public investment decision must be made first consideration should be given to the needs of the Ontario resident (currently responsible for half of the total tourism receipts), but every effort should be made to appeal to the non-resident or secondary market groups (other Canadian, U.S., other foreign). .tourism policies should give priority to the income and employment benefits of tourism, balance of payment objectives are secondary.

continued . . .

TABLE V-1, continued

POLICY ISSUE	APPARENT POLICY DIRECTIONS	IMPLICATIONS FOR TOURISM
V Whether good agricultural land in southern Ontario should be protected for agriculture or used for housing and other forms of economic development.	.direct future urban expansion towards areas where it will not impair agriculture or the natural environment. .programs will be established to maintain the economic viability of farming in areas having priority for agricultural use. .promoting a rural landscape ethic which would engender an understanding of and respect for property rights, public objectives in recreational development landscape amenity, rural environmental values and life style of the rural community. .commitment to preserve good agricultural land in all parts of Ontario	.where tourism development attention focusses on prime agricultural areas every effort should be made to avoid conflict with and disruption of agricultural activities (e.g., Niagara). .the educational role of tourism can be utilized through development of interpretive centres, resource heritage attractions (farming, logging, mining) to enhance the urban resident's understanding of rural problems.

2. Impacts of Tourism Development

As is the case with all forms of development and change, tourism development can produce both desirable and undesirable consequences, i.e., benefits and costs. The first step in amplifying desirable consequences and in avoiding undesirable consequences is the identification of the various impacts that could result from development. Impacts are grouped into three interlinked categories: economic, social and environmental.

The measurement of benefits and costs is complex:

a) It is difficult to convert all impacts into a common measurement unit (e.g., dollar value);

b) Exact measurement of secondary and tertiary (i.e., non-direct) benefits/costs is impossible due to the inability to isolate the different causes in observed effects;

c) Since projects consist of several actions and each action has its own set of impacts, a complex series of benefits and costs exist for that project. If individual actions in the project are altered, there would also be an alteration in the total sum of benefits and costs for the project;

d) Difficulty arises with the level (e.g., national, provincial, regional, local) used in the impact measurement. A particular project might produce a completely different ratio of benefits/costs at the local level than it would using a provincial level for assessment.

The interest in impact analysis is relatively recent and the increasing amount of attention should produce more accurate and useful measurement techniques in the future. Most past literature has been concerned with the impact of one particular project at the local or regional level. Most work has focussed on economic impact, with environmental impact analysis commanding attention only recently. Social impact analysis is still in its infancy, and the process of integrating all three types of impact so that a final benefit/cost total can be calculated is still evolving.

Ideally, a detailed assessment of benefits and costs would include an assessment of each of the following components for each proposed action:

1. Nature of benefits/costs, e.g., economic, social, environmental.
2. Incidence of benefits/costs, e.g., who, where.
3. Magnitude of benefits/costs;

4. Direction (trend) in benefits/costs before action

5. Context of benefits/costs, e.g., where in economic cycle? Types of firms? Type of rules?

6. Variation in benefits/costs (or stability)

7. Acceptability of benefits/costs, e.g., form? amount?

Seldom is information and experience available to accurately respond to each of the components outlined above.

Some of the advantages and disadvantages of tourism are assessed in
Table V-2 (Economic Impacts),
Table V-3 (Social Impacts
and Table V-4 (Environmental Impact).

Table V-5 is an attempt to demonstrate some of the interlinkage between these impacts. This table also suggests guidelines for development and points out possible conflicts.

Before reviewing detailed impacts of tourism development, several general observations must be made:

1. Tourism should be treated like any other industry in comprehensive planning. Since a usual objective of comprehensive planning is to increase the diversity of the economic base (hence, reducing the dependency upon any single industry), and since tourism is an industry which can (and does) occur in all areas, the consideration of tourism in area comprehensive plans is a virtual requirement.

2. Tourism is a growth industry since it is related to income (income elastic) which has been steadily rising. Tourism growth generally exceeds the growth of most other export-oriented industries.

3. Tourism is an industry which has competitive advantages, e.g., there is only one Toronto, one series of Great Lakes, one Niagara Falls, etc.

4. Tourism promotes a 'good image' of the Province, allowing it to achieve other objectives, e.g., allows potential consumers of non-tourism Ontario goods and services to see the range of consumption and investment opportunities available.

5. The performance of isolated large scale tourism developments located away from major markets has not usually met expectations of benefits.

TABLE V-2

SUMMARY OF THE ECONOMIC IMPACT OF TOURISM DEVELOPMENT

LOCAL/REGIONAL LEVEL

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
1. Entrepreneurial opportunity	1.1 Often tightly held --profits accrue to few	.Assist provincial residents to identify investment opportunities
	1.2 Non-resident ownership --particularly with chains and franchises	.Provide financial incentives only to provincially-based firms
	1.3 Marginal operators/ operations can detract from a successful and quality-oriented tourist area	.Encourage municipalities to require high standards through bylaws .Public inspectors must employ high standards (health, fire, licensing)
2. Tourism development provides employment opportunity (highly labour-intensive --offers jobs to semi-skilled and and unskilled)	2.1 Managerial level jobs often are filled from outside the local community	.Develop and support regional management and hospitality-training programs (courses, seminars, advisory services)
	2.2 Majority of jobs at minimum wage--menial (particularly in the food, beverage and lodging business)	.Encourage larger scale operations providing a greater variety of job types and opportunities
	2.3 Employment often seasonal --non-residents given summer jobs or cyclical local unemployment	.Encourage seasonal operations only in those areas where other complementary, non-overlapping, seasonal opportunities exist .Promote those locations having the resources to support year-round activity and encourage diversified operations to take advantage of all seasons

continued . . .

TABLE V-2, continued

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
2. continued	2.4 High investment (CCRD, 1975) or tourist expenditure ($14,000--CGOT, 1974) required to generate one job*	.If primary purpose of development is job-creation, assess comparative efficiency of all other types of economic activity prior to investment
		.Greater planning effort to determine full costs before commitment to project
	2.5 Seasonal visitors can tie up local construction and service industries, prohibiting use by local residents	.Work with regional development agencies to determine markets and needs
		.Pre-planning emphasizing using percentage of absorptive capacity of construction industry as maximum allowable
		.Phasing of tourist construction activities over a five year period
		.Incentives programme given to local entrepreneurs to expand or begin new services necessary
		continued . . .

*CCRD, 1975--CCRD, Economic Significance of Tourism, and Outdoor Recreation for Rural Development, (Ottawa, June, 1975). Canadian Council on Rural Development (CCRD)

*CGOT, 1975--CGOT, Tourism: Its Magnitude and Significance, Research Bulletin #2, (Ottawa, November, 1974).

TABLE V-2, continued

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
3. Contribution to local tax base	3.1 Cost of servicing often higher than possible tax revenue 3.2 Industry volatile and sensitive to economic fluctuations--overdependence on this single industry not wise	.Where additional servicing/infrastructure is required by a tourism development, encourage and/or assist municipality to determine cost/benefit and negotiate an appropriate cost-share agreement with the developer. .Promote major tourism development only in those areas having a mixed and relatively stable economic base
4. Multiplier effect in community	4.1 High leakage possible if services and/or goods cannot be provided locally (particularly true in non-urban or small urban locations)	.If public assistance is required encourage or conduct feasibility and impact studies to determine if benefits are distributed according to local and/or provincial objectives and policies .Assist local businessmen to take advantage of local resources in providing for tourists

continued . . .

TABLE V-2, continued

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
5. Many tourist-oriented services have local utility (specialty shops, infrastructure, recreation resources) and provide goods and services to residents that could not otherwise be provided	5.1 Possible inflationary consequences of tourism spending (e.g., tourist willing to pay more than residents)	.Via the local bylaws and planning process, ensure that only certain areas are zoned for tourism-related developments
	5.2 Seasonal nature of tourism demand may crowd-out resident shopper/user during peak periods (summer, weekend)	.Provide assistance in upgrading management of traditional local services
		.Ensure that provincial incentives are consistent (that the local area does not get reduced services of one kind when it gets increased tourism support)
	5.3 Tourist-oriented services can 'price-out' more necessary local services--financial incentives may direct local developers to serve tourist rather than community needs	.Ensure through planning process that diversity is retained and enhanced, such as assisting local traditional tradesmen to produce tourist-oriented products in addition to those offered to locals
	5.4 A 'tourist-haven' reputation can drive away other potential customers	.Consider the possibility of rent controls on a <u>local</u> basis to retain local businesses.

continued . . .

TABLE V-2, continued

PROVINCIAL LEVEL

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
1. Tourism is an instrument of regional policy aimed at a more equitable balance of income and jobs between regions .In-province travel patterns of Ontario residents can aid in transferring monies from well-developed to less well-developed regions.	1.1 See all possible disadvantages in previous table. Note: most of the negative impacts are felt at the local scale.	.Assistance in developing a tourist plan for the local area .Consider applying selective land use and rent controls on a local basis to ensure that objectives are met .Greater consistency in financial incentives to ensure no cross-purposes of such incentives between tourism and other industries .Loan provincial planners to local area for developing <u>and</u> implementing tourist plan
	1.2 Because of the structure of the tourism industry (number and variation in type of operators) it is an industry which puts unusual strain on the administrative machine of any government seeking to promote and guide its development.	.Survey local areas to be assisted from the viewpoint of overall development and their potential provincial contribution (rather than a priori attempt to develop a tourism industry) via <u>any</u> industrial development .Assess local advantages and disadvantages for each type of input--labour, capital, etc. .Implement tourism training programmes and consider creating a tourist career ladder Province-wide .Provide assistance to local governments in assessing their capabilities to service and support a tourist industry

continued . . .

TABLE V-2, continued

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
2. Tourism is an 'export industry' capable of bringing foreign or out-of-province expenditures to Ontario.		
3. Tourist/recreation demand often focusses on resources/areas that are often unproductive for other industries; development thus clearly contributes to overall economic growth.		

TABLE V-3

SUMMARY OF THE SOCIAL IMPACTS OF TOURISM DEVELOPMENT

LOCAL/REGIONAL LEVEL

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
1. Educational value to residents of exposure to visitors from different areas and backgrounds.	1.1 Possible xenophobia (dislike of foreigners)	.Identify those populations most likely to be altered by tourism and work with these communities in advance of development to establish appropriate guidelines and controls for reducing adverse contacts. .When potential conflicts are foreseen: .control volume of tourist flow .reduce duration of visitor-resident contact .separate tourist and resident-oriented facilities/activities geographically .downplay those resources traditionally used by resident population in promotion of area .develop hospitality training programs to upgrade quality of service and to enhance self-perceptions .encourage development and/or involvement of groups/societies to study and preserve historical/cultural facilities and events .encourage and/or provide adequate funding for management and control of local facilities .determine social carrying capacity of area (facilities, accommodations) and restrict use and growth to these levels
2. Possible positive influence on life-style because of social interaction between resident and visitor.	2.1 Possible disruption of local life style as prime leisure resources are consumed by visitors 2.2 Possible development of carnival atmosphere may 'cheapen' local atmosphere and resident self-image 2.3 Possible evolution of a servile attitude among the local population	
3. As a consequence of tourist demand, old traditional customs may be reintroduced or preserved in a local area.	3.1 Activities (e.g., cultural events) may commercialize to the point where traditional components or qualities are lost 3.2 Tourist's attitudes may hurt local pride and dignity	

continued . . .

TABLE V-3, continued

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
4. Tourism generates pressures to preserve buildings and amenities having historic/cultural interest. Politically, gov't. assistance is often generated; economically, user fees contribute to upkeep and maintenance.	4.1 High visitation rates may cause deterioration of historical/cultural resource	

continued . . .

TABLE V-3, continued

PROVINCIAL LEVEL

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
1. Resident travel within Ontario helps strengthen provincial integration by introducing populations from different regions.	1.1 Possible loss of diversity of lifestyle among the province's regions	.Create programmes to foster recognition of diversities .Develop programmes to preserve desirable cultural features .Link cultural mosaic to natural features when establishing parks (i.e., in Great Britain, Great Smokey Mountains National Park in the United States) .Aid local areas in identifying key traits and artifacts of interest .Aid local areas in establishing local museums, theme villages, etc. .Aid in establishing local heritage societies and then support them via the Ontario Municipal Board (when developers want to rip down "old" buildings for "new" developments)
2. Foreign travel in Province enhances awareness of Ontario and its varied lifestyles and available opportunities for later migration and/or investment.		
3. Fosters recognition of interdependencies between provinces and countries.		
4. Fosters recognition and preservation of provincial ethnic diversities and cultural heritages.		

TABLE V-4

SUMMARY OF THE ENVIRONMENTAL IMPACTS OF TOURISM DEVELOPMENT

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
1. Tourism/recreation generates pressure to maintain a clean, pollution-free environment.	1.1 Unless controlled, tourists/recreators can generate litter and other forms of pollution (litter surveys show locals are usually the worst culprits)	.Identify natural areas of such high, ecological sensitivity that they cannot sustain major tourism development
2. Tourism/recreation generates interest in and awareness of significant natural features.	2.1 Possible despoiling of resources with high recreational potential (e.g., shorelines, lakes)	.Work with appropriate agencies to determine if and how controlled visitation of appealing areas can be conducted .Conduct capability studies in area of high recreational potential to determine acceptable levels of use and to establish necessary controls
3. Ease sub-marginal farms (forest-agricultural fringe) back to natural state.	3.1 Loss of livelihood for sub-marginal farmers 3.2 Loss of opportunities of having a "source of security" available in the event of business failure or economic downturn (depression)	.Provide advisory services to rural individuals and communities to show how tourism can complement and supplement the rural economy .Re-training programmes .Retain farm plots for urban residents .Rural zoning

continued . . .

TABLE V-4, continued

ADVANTAGES	DISADVANTAGES	MEANS OF OVERCOMING DISADVANTAGES
4. Education through tourism--develop much needed land or environmental ethic through specialized attractions (museums, theme parks, interpretive centres) vacation farms, etc.	4.1 Aroused interest in resource base often leads to more intensive utilization--more difficult to manage and control	.Provide anti-pollution education and reminders at service centres and destination areas. .Develop facilities (raised boardwalks, fences) to direct traffic flow and enforce their use
5. Many tourism/recreational activities are complementary to existing land utilization patterns. That is, uses do not alter or consume landscape in any significant manner. (e.g., hiking, non-power boating, driving for pleasure on existing roads, controlled hunting and fishing, use of logging roads when not harvesting)	5.1 Some tourism land uses are 'space demanding' and can alter or consume rural or natural landscapes significantly (e.g., cottages, campgrounds, theme parks).	.Schedule use of fragile areas or "wilderness" areas to ensure quality experiences and reduced impacts .Use common carriers to transport visitors through areas or to an attractive natural area .Institute rural zoning and land grading regulations

TABLE V-5

FACTORS WHICH USUALLY INFLUENCE DIRECTION AND MAGNITUDE OF IMPACTS

FACTORS	ECONOMIC SIGNIFICANCE	SOCIAL SIGNIFICANCE	ENVIRONMENTAL SIGNIFICANCE	SUMMARY/GUIDELINES
AREA CHARACTERISTICS				
Geographical Size of Planning Area	. the larger the area being planned, the smaller the possibility of 'leakage'. . the potential for 'packaging' of diverse opportunities increases with size. . problems associated with planning increase with area size (e.g., co-ordination, setting of priorities).	. the larger the area being planned, the less problems of crowding and congestion of accommodations, transportation and attractions.	. the larger the area being planned, the easier it is to 'zone' and separate conflicting land uses.	. comprehensive planning of relatively large geographic zones, involving several municipalities, is desirable (but difficult to implement).
Economic Development of Destination Area	. the benefits (multiplier effect) to the 'primary impact area' increase with the size, diversity and stability of the area. . viability of new tourism plant increases with degree of commercial travel and wealth of resident market (e.g., regular use of restaurant). . necessary infrastructure relatively easy to provide in developed area.	. many negative impacts will be minimal if service community is not totally dependent on tourism. . competition for labor resources will provide some new employment as well as displace certain resources and activities.	. expansion of currently viable urban areas as tourism service centres is less likely to alter natural environments than new development in predominantly natural or rural areas.	. major new tourism development should focus, where possible, on established service centres.
Strength of Local Culture	. a strong, and differentiated local culture increases the attractivity of an area for tourism.	. a strong sense of local identity minimizes foreign impact. . the greater the difference between visitor and resident the greater the possibility for outside impact.	. strong local cultural ties to the land over time have reached an accommodation with their natural environment; as these ties are lost the land ceases to be culturally protected.	. encourage development of ethnic attractions and themes only when cultural base is strong and resistent to change.

continued . . .

TABLE V-5, continued

FACTORS	ECONOMIC SIGNIFICANCE	SOCIAL SIGNIFICANCE	ENVIRONMENTAL SIGNIFICANCE	SUMMARY/GUIDELINES
AREA CHARACTERISTICS, continued				
Environmental Characteristics of Destination Area	. the more 'unique' the area the greater the potential for commercial development. . unique sites tend to be already exploited by local businessmen in an uncontrolled manner.		. 'unique' environments should be protected and preserved for future generations. . 'unique' environments are often most sensitive to use.	. CONFLICT - must judge each case on own merits and make decision re: 'trade-offs'.
INDUSTRY CHARACTERISTICS				
Seasonality	. the longer the season, and the more seasons that can be utilized, the greater the economic opportunity. . the longer the use season, the more investment necessary for allowing continued use during seasonal changes.	. year-round employment generally better for self-esteem of worker. . however, dependence on tourist reduced if cyclical employment available in other seasons.	. temptation to exploit resource base during short operating season reduced if industry is year round.	. diversified plant capable of operating in all seasons generally preferable.
Degree of Local Involvement	. multiplier effect substantially increased if profits are held and/or invested locally. . local ownership hopefully increases industry sensitivity to role in local economy.	. involvement of locals in managerial, skilled and semi-skilled occupations reduces 'servility' concern. . local ownership/management likely to increase sensitivity to social issues related to tourism development.	. locally based owners/operators usually favour rapid and massive development, while non-locals support preservation.	. local ownership and control clearly desirable. . public agencies should use every means available to encourage local entrepreneurial involvement. . Conflict between rapid development (locals) and preservation (non-locals).

TABLE V-5, continued

FACTORS	ECONOMIC SIGNIFICANCE	SOCIAL SIGNIFICANCE	ENVIRONMENTAL SIGNIFICANCE	SUMMARY/GUIDELINES
Spatial Characteristics (Intensive/Extensive Layout)	. generally, savings can be realized in total capital costs by intensive development.	. intensive development can be relatively isolated from community, thus reducing impacts.	. intensive site development and use easier to control and manage; disruption of immediate area high with consequent preservation in secondary impact area . extensive uses (e.g., hunting, fishing, hiking) less likely to alter physical environment significantly.	. intensive development should be utilized whenever possible.
Extent to Which Industry Depends on Community Facilities	. if community is, in itself, an attraction then development costs will be correspondingly lower. . many services are already available in established community.	. heavy tourist use of local commercial and 'leisure' facilities will likely increase probability of conflict.	. if existing community becomes base for new development, little alteration of natural environment foreseen.	. CONFLICT
Rate of Growth Required	. if required growth rate is rapid, short term demands on local economy and infrastructure will be high.	. rapid change of any type likely to alter social matrix of impact area. . gradual change preferable so as to soften impacts and permit re-orientation if original direction produces undesirable consequences.	. rapid alteration more likely to produce unforeseen and irreversable environmental problems.	. systemmatic, relatively cautious development of resource base is less likely to generate problems.
VISITOR CHARACTERISTICS				
# Visitors/# Residents	. the greater the number of visitors, the greater the revenue potential.	. the smaller the visitor population, the less significant the impact (particularly in small communities).	. possibility of environmental degradation increases with volume of use.	. CONFLICT - must judge each case on own merits and make decision re: 'trade-offs'.
Length of Stay of Visitors	. the longer the stay, the greater the revenue potential.	. the shorter the stay, the less significant the impact.	. if the #'s of visitors constant the shorter the stay the smaller the potential harm.	. CONFLICT - must judge each case on own merits and make decision re: 'trade-offs'.

continued . . .

TABLE V-5, continued

FACTORS	ECONOMIC SIGNIFICANCE	SOCIAL SIGNIFICANCE	ENVIRONMENTAL SIGNIFICANCE	SUMMARY/GUIDELINES
VISITOR CHARACTERISTICS, continued				
Socio-Economic Status of Visitors	. the higher the socio-economic status the greater the commercial opportunity.	. the smaller the difference between visitor and resident the less significant the social impact.	. there are indications that visitors higher on the socio-economic scale (also better educated) are more sensitive to environmental issues.	. CONFLICT
Ethnos and Race of Visitors	. as visitors having different ethnic traits often come greater distances, expenditure is greater. . ethnic groups resident in Ontario often make minimal use of commercial services when travelling.	. the smaller the difference between visitor and resident the less significant the social impact.	. ethnic groups often represent lower socio-economic groups which tend to have a lesser regard for the environment.	. CONFLICT

B. Private Sector Guidelines

This section suggests some broad business-oriented guidelines, in particular, guidelines concerned with diversification, seasonality, and location for individual tourism activities. This last subject - location guidelines - is of prime importance in narrowing down the geographic areas with development potential for specific activities.

1. Diversification

It has been widely acknowledged that plant development based on a single tourism activity is likely to encounter problems associated with seasonality, changing consumer preferences, and a narrowly-defined market. Furthermore, from the consumer's perspective, a development or destination area that offers a diverse range of complementary tourism and recreational opportunities will encourage longer visits and more repeat visitation.

a) It has been accepted that most 'task oriented' travel, particularly business travel, is non-discretionary and that little can be done to expand this base market in urban areas. However, everything possible should be done to maintain this market through the upgrading of services and the active promotion of complementary meeting and convention facilities. Operators of establishments and services largely dependent on the business travel market should be encouraged to diversify, providing more services to the discretionary or leisure traveller (vacations, weekend trips, etc.) so as to ensure the year-round availability of tourism opportunities in major urban service centres throughout Ontario.

Diversification would also permit the operator to capitalize on the resident market for 'evenings out', rental of meeting facilities and generation of VFR (visit friends and relatives) traffic.

Where an operator is largely dependent on the discretionary traveller, he should be encouraged to develop an optimal mix of services that take full advantage of the range of tourist activities available or having potential in the area. This mix should consider complementary activities for each operating season as well as those activities that logically link to permit year-round operation.

2. Seasonality (Table V-6)

Tourism in Ontario exhibits a summer focus, and the short summer operating season results in high off-season unemployment, low investment returns and overcrowding of summer-oriented facilities. The difficulties created by seasonal operations are not entirely attributable to climatic conditions. School vacations are an important factor, although the vacation timing patterns appear to be moving away from a long summer vacation to a number of shorter vacations at other times. The tourism industry in Ontario has been slow to respond to the obvious development challenge to provide year-round operations, or to lengthen the operating season in order to take advantage of the increasing 'shoulder season' market.

Table V-6 describes seasonal participation in tourism from a Province-wide perspective. Since Ontario is very large, climate varies considerably with variations in latitude and altitude, and is influenced by the Great Lakes.

A number of tourism-related activites (e.g., beach, swimming, boating, water-based sports, skiing, snowmobiling and ice fishing) are highly sensitive to climatic conditions, and can be recognized as 'single season' activities. In other instances (e.g., hunting and fishing), legislation rather than climatic considerations governs the 'single season'. However, other activities (e.g., some facility-oriented outdoor recreation activities, touring, attending special events, visiting attractions, resort vacations, camping, urban experience) are more independent of climate, and offer potential for year-round participation.

In a number of instances, the only opportunities currently available have a summer focus. Resort vacations, for example, tend to be oriented toward summer activities such as swimming, boating, water-based sports and golfing rather than 'shoulder season' or winter activities. Often the physical plant is not constructed as to permit use in 'shoulder' or winter periods.

The large capital cost required in the development of most accommodation types dictates that the accommodation must be used during the majority of the year. The management problems involved in running a seasonal accommodation (e.g., difficulty in obtaining trained staff, and notifying prospective customers when the operation is opened and closed) direct that year-round operation is most desirable. However, some accommodation types, in some locations, will only initially be able to operate seasonally, due to the seasonal nature of traveller visitation. The combination of accommodation forms with food and beverage services, entertainment and other activities can provide cash flow from local residents in the "off-season" in sufficient volume to permit year-round operation of the combined unit.

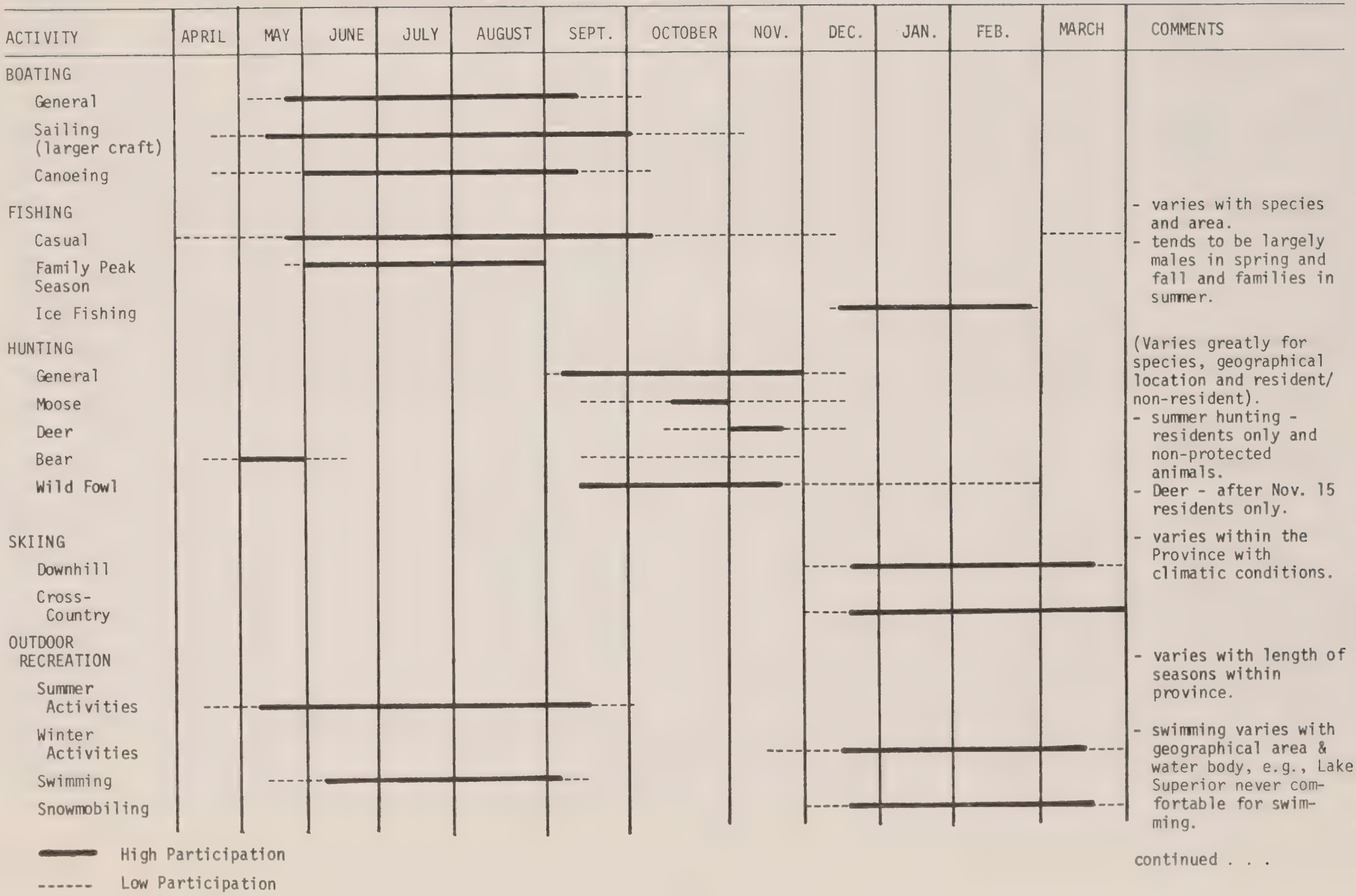
Other suggestions for expanding tourism operations into the 'shoulder' and winter seasons are:

1. developing the facilities to permit the packaging of a number of 'single season' activities together in sequence (e.g., boating in summer, hunting in fall, skiing in winter) so that a year-round operation can be maintained;
2. extending the season by additional development (e.g., artificial snow on ski hills, enclosing swimming pools) and promoting the availability during the 'shoulder' seasons;
3. developing those activities with year-round potential (e.g., shopping, eating out) near the urban centres.

One major difficulty in extending the tourism season must be noted: numerous operators are not interested in extending their season. Some operators leave the Province in the winter for a 'permanent' second residence in a warmer climate; and there are other operators for whom tourism is a secondary, seasonal source of income. The differences in winter-time accessibility between Northern and Southern Ontario must also be considered. Northern Ontario, because of the longer distance from major markets and more severe climatic conditions, is less accessible by road during the winter than Southern Ontario. If air and rail transportation becomes more prevalent, this disparity will be lessened.

TABLE V-6

LENGTH OF SEASON BY ACTIVITY



continued . . .

TABLE V-6, continued

ACTIVITY	APRIL	MAY	JUNE	JULY	AUGUST	SEPT.	OCTOBER	NOV.	DEC.	JAN.	FEB.	MARCH	COMMENTS
VIEW NIAGARA FALLS													
VIEW NATURAL ATTRACTIONS													
SHOPPING													- may be some decline during winter months
EATING OUT													
ATTENDING SPECIAL EVENTS													
VISIT MAN-MADE ATTRACTIONS													- varies greatly with individual attraction
EN ROUTE ELSEWHERE													
Urgent													
Non-Urgent													
BUSINESS - TASK													
BUSINESS - EVENT													
SECOND RESIDENCE													- depends on accessibility, distance to permanent residence and winterization of facilities
VISIT FRIENDS AND RELATIVES ACTIVE/PASSIVE													- some decrease in winter months, particularly on part of other Canadians
RESORT VACATION													- summer focus - season can be extended to year round if plant exists - speciality depends upon activity
Urban													
Wilderness													

continued . . .

TABLE V-6, continued

ACTIVITY	APRIL	MAY	JUNE	JULY	AUGUST	SEPT.	OCTOBER	NOV.	DEC.	JAN.	FEB.	MARCH	COMMENTS
CAMPING Urban, Touring and Wilderness													- small amount of winter camping
URBAN EXPERIENCE													- some decline during winter
TOURING Group and Individual													

3. <u>Location of Activities</u> (Table V-7)

It is obvious that areas of the Province vary in their suitability for development of different tourism activities. A summary of the areas of the Province exhibiting potential for activity-related tourism development is contained in Table V-7.

The potential areas were defined by:

1. identifying the resource base requirements of each activity;
2. matching the resource base requirements with the characteristics of the resource base in Ontario to determine capability;
3. reviewing locations of existing development for each activity;
4. reviewing the current activity participation by economic area (Chapter III); and
5. reviewing the future market potential information (Chapter IV) for indications about desired future locations.

Table V-7 is important; it sorts out suitable activities by broad geographic regions. The next Chapter will build on this and identify specific tourism development zones.

TABLE V-7

POTENTIAL AREAS FOR ACTIVITY-RELATED TOURISM DEVELOPMENT

ACTIVITY	ONTARIO ECONOMIC REGIONS										
	THROUGHOUT ONTARIO	LAKE ST. CLAIR	LAKE ERIE	MID WESTERN	NIAGARA	CENTRAL ONTARIO	GEORGIAN BAY	LAKE ONTARIO	EASTERN	NORTH EASTERN	NORTH WESTERN
1. BOATING											
A. Large Sailing Craft		Lake St. Clair Lake Huron Lake Erie		Lake Huron Shoreline	Lake Ontario Lake Erie	Lake Ontario Shoreline Lake Simcoe	Georgian Bay Lake Huron	Lake Ontario Shoreline	St. Lawrence River	North Channel Lake Nipissing	West Shoreline of Lake Superior Lake of the Woods
B. Cruisers		Above	Lake Erie Shoreline	Above	Above	Above	Above plus Trent Canal System, Lakes Joseph-Rosseau-Muskoka	Above plus Trent Canal System	Above plus Rideau Canal, Ottawa River	Above	Above plus Rainy River
C. Houseboats		Lake St. Clair				Lake Simcoe	Trent Canal System	Trent Canal System	St. Lawrence River to Trenton	North Channel	Lake of the Woods and larger lakes west of Thunder Bay
D. Canoes/ Canoe Tripping								Kawarthas		Algonquin Park Timagami area numerous rivers	Lake of the Woods numerous lakes and rivers
E. Outboard Touring		Lake St. Clair and rivers				Numerous smaller lakes and Lake Simcoe	Rivers, Trent Canal System, plus numerous smaller lakes	Trent Canal System plus numerous smaller lakes	Rideau Canal System plus numerous smaller lakes	Numerous lakes and rivers	Numerous lakes and rivers
Casual	X										
2. FISHING*											
A. Trip - Auto Access, Lodge Based						Lakes Simcoe and Couchiching	Lakes in the Muskoka area	Rice Lake and Lakes in the Kawartha and Haliburtan areas	Rideau Lakes	Lake Nipissing, numerous lakes with road access in the area between Highways 11 and 17	Lake of the Woods and numerous lakes with road access
				Great Lakes fisheries could be most significant if management programs are successful							
B. Trip - Wilderness										Numerous lakes in the area between Highways 11 and 17	Numerous lakes north of Lake Superior, numerous lakes west of Thunder Bay
C. Ice		Lake St. Clair				Lake Simcoe	Scattered lakes in the Muskokas	Scattered lakes in the Haliburton and Kawartha areas	Numerous lakes	Numerous lakes	Lake of the Woods and numerous lakes
*D. Casual Fishing	X										

TABLE V-7, continued

ACTIVITY	THROUGHOUT ONTARIO	LAKE ST. CLAIR	LAKE ERIE	MID WESTERN	NIAGARA	CENTRAL ONTARIO	GEORGIAN BAY	LAKE ONTARIO	EASTERN	NORTH-EASTERN	NORTH-WESTERN
	ONTARIO ECONOMIC REGIONS										
3. HUNTING											
A. Trip - Big Game Moose										South of the Highway 11 corridor	South of the Albany River and English River Area
Deer							Bruce Peninsula Muskokas	Haliburtan area	Eastern and Northern areas	Manitoulin Island and southern areas	Lake of the Woods & Thunder Bay areas
Bear							Parry Sound area	Northern extremity	North Western extremity	In the area between Highways 11 and 17	Kenora area
B. Trip - Wild Fowl		Entire area								Entire area	Entire area
C. Small Game	X										
4. SKIING											
A. Downhill							Collingwood, Beaver Valley, near Barrie			Sault Ste. Marie	Thunder Bay
B. Cross Country	X										
5. OTHER OUTDOOR RECREATION											
A. Nature Based Swimming	X										
- Major Beaches		Lake Huron Shoreline					Sauble Beach area Wasaga Beach area	Prince Edward County			
Hiking	X			Bruce Trail	Bruce Trail	Bruce Trail	Bruce Trail Ganaraska Trail	Ganaraska Trail	Rideau Trail		
Water Skiing	X										
Scuba Diving	X						Fathom Five Provincial Park (with many opportunities for scuba diving	Numerous lakes	Numerous Lakes	Near Sault Ste. Marie	Nipigon Bay Rossport Thunder Bay
Snowmobiling	X										
B. Organized, Facility Oriented, Commercial or Club e.g., tennis, horseback riding, golfing	X										

TABLE V-7, continued

ACTIVITY	THROUGHOUT ONTARIO	LAKE ST. CLAIR	LAKE ERIE	MID WESTERN	NIAGARA	CENTRAL ONTARIO	GEORGIAN BAY	LAKE ONTARIO	EASTERN	NORTH-EASTERN	NORTH-WESTERN
		ONTARIO ECONOMIC REGIONS									
6. VIEWING NATURAL ATTRACTIONS		Point Pelee		Elora Gorge	Niagara Escarpment		Niagara Escarpment 30,000 Islands	Mazinaw Rock in Bon Echo Provincial Park, Warsaw Caves	1000 Islands	Agawa Canyon Manitoulin Island	Kakabeka Falls North Shore of Lake Superior Ouimet Canyon
Niagara Falls					Niagara Falls						
7. SHOPPING	X					Toronto					
8. EATING OUT	X										
9. SPECIAL EVENTS		Windsor		Kitchener Stratford	St. Catharines Niagara Falls Brantford	Toronto	Huntsville	Mosport	Ottawa	North Bay, Sault Ste. Marie, Manitoulin Island Cobalt	Kenora Thunder Bay
10. MAN-MADE ATTRACTIONS											
Industrial		Windsor, Sarnia			Hamilton	Toronto (potential)	Douglas Point Collingwood			Sudbury, Cobalt, Kapuskasing	Thunder Bay
Educational		Windsor	London	Kitchener/ Waterloo Guelph	Hamilton	Toronto			Kingston/ Ottawa	Sudbury	Thunder Bay
Entertainment		Windsor	London	Stratford	Niagara Falls, Hamilton, Rockton, Niagara-on-the-Lake, Fort Erie	Toronto	Bracebridge	Mosport		Sault Ste. Marie Cochrane	Thunder Bay
Theme/Historical		Windsor Amherstburg		Kitchener/ Waterloo, Elmira, Elora, St. Jacobs, Stratford	- along Niagara River - Hamilton - Brantford	Toronto	Midland, Wasaga, Penetanguishene	Peterborough	Kingston, Morrisburg, Pembroke, Prescott, Ottawa	North Bay St. Joseph Island	Thunder Bay
11. EN ROUTE ELSEWHERE		Primarily Highway 401 corridor	Primarily Highway 401 corridor	Primarily Highway 401	Primarily Q.E.W. corridor	Primarily Highway 400 and 401 corridors	Highways 69, 11, 6 and Manitoulin Ferry	Primarily Highway 401	Highways 401, 17, 417 and 16	Highways 17, 144 and 11	Primarily Highway 17, also Highways 11 and 71

TABLE V-7, continued

ACTIVITY	THROUGHOUT ONTARIO	ONTARIO ECONOMIC REGIONS									
		LAKE ST. CLAIR	LAKE ERIE	MID WESTERN	NIAGARA	CENTRAL ONTARIO	GEORGIAN BAY	LAKE ONTARIO	EASTERN	NORTH-EASTERN	NORTH-WESTERN
12. BUSINESS (TASK)											
Route Task	X										
Single Task	X	Windsor	London	Kitchener/ Waterloo	Hamilton	Toronto and surrounding towns e.g., Oshawa	Barrie	Peterborough	Kingston/ Ottawa	North Bay, Sudbury, Sault Ste. Marie Timmins	Thunder Bay
13. BUSINESS EVENT											
Convention		Windsor	London		Hamilton	Toronto			Ottawa		Thunder Bay
Small Meeting, Retreat	X										
14. SECOND RESIDENCE											
Lakeshore		Lake St. Clair Lake Erie Lake Huron	Lake Erie	Lake Huron	Lake Erie	Lake Simcoe plus numerous smaller lakes	Georgian Bay plus numerous smaller lakes	Lake Ontario plus numerous smaller lakes	St. Lawrence plus numerous smaller lake lakes	Lake Superior, North Channel plus numerous smaller lakes	Lake Superior, plus numerous smaller lakes
Upland	X										
Special Purpose											
15. VISITING FRIENDS AND RELATIVES											
Passive	X										
Active	X										
16. RESORT VACATION											
Resort Hotel		Lake Huron Shoreline			Lake Erie Shoreline	Lake Simcoe	Shorelines of Lake Huron and Georgian Bay, Muskoka Area	Haliburton and Kawartha areas	St. Lawrence and Rideau Lakes	Near Sault Ste. Marie, Lake Nipissing, French River, Manitoulin Island	Lake of the Woods
Wilderness (road access)								Northern part of area	South of Renfrew	Lake Superior plus Southern part of area	South-West part of area
Special Purpose											

TABLE V-7, continued

ACTIVITY	THROUGHOUT ONTARIO	ONTARIO ECONOMIC REGIONS									
		LAKE ST. CLAIR	LAKE ERIE	MID WESTERN	NIAGARA	CENTRAL ONTARIO	GEORGIAN BAY	LAKE ONTARIO	EASTERN	NORTH-EASTERN	NORTH-WESTERN
17. CAMPING Destination	X										
Wilderness							Northern part of area	Northern part of area	Western part of area	Virtually entire area	Virtually entire area
Touring		Off Highway 401	Off Highway 401	Off Highway 401	Off Q.E.W.	Off Highways 401 and 400	Off Highways 6, 400, 11 and 69	Off Highway 401	Off Highways 401, 417 and 17	Off Highways 17 and 11	Off Highways 17 and 11
18. URBAN EXPERIENCE		Windsor				Toronto			Ottawa		
19. TOURS - GROUP Affinity	X										
Special Interest	X										
General	X										
20. AUTO TOURING	X										

CHAPTER VI

SELECTION OF A STRATEGY FOR TOURISM DEVELOPMENT

This chapter outlines a suggested strategy for tourism development in the private sector based on a concept of tourism development zones, connected by tourism corridors and supported by a tourism hinterland.

A. Strategy Options

The analytical reviews of supply, demand and consideration of broad Provincial goals (Chapters II to V) strongly support a strategy based on a geographic concentration of development. A strategy based on 'diffusion' of development would make inefficient use of both private and public resources. Such inefficiency translates into high costs and less marketable tourism product. Although, by definition, tourism means movement, the movement tends to be from centre to centre with stops at defined locations. Recreation/tourism opportunities are not evenly dispersed throughout the Province. Even if it were desirable to disperse usage, the cost required to accomplish this is prohibitive. Some activities require dispersion (e.g., fly-in fishing), but the vast majority of activities are consumed in small, defined geographical areas. Concentration of development usually results in lower development costs and increases the ease of management.

Also, tourism development must build on what presently exists and what is definitely scheduled for development. This is not to say that we simply extrapolate the past--we must be creative in considering potential opportunities and evaluating which ones should be included. However, in the economic climate of the next few years, there will not be much experimentation with schemes that do not have a record of financial success. The cost required to purposely shift consumption patterns through the development of tourism plant where no plant currently exists, is prohibitive.

Adherence to these basic principles should result in an efficient use of private and public resources in tourism development.

An approach to strategy selection might be based on a sectoral approach, i.e., a strategy for food services, another strategy for accommodation, etc.

This approach is defective since it fails to recognize the vital interrelationships between all industry sectors.

Business logic favours a development strategy based on interpreting all industry sectors. It also supports a strategy which considers integrated development on a geographic or zonal basis. With this strategy, there are:

1. zones where development will be concentrated;
2. connecting touring corridors leading to and linking these zones; and
3. supporting hinterland.

A schematic relationship of tourism development zones, touring corridors and hinterland is outlined in Figure VI-1. Figure VI-2 outlines a possible configuration of components within a zone.

B. Selected Strategy - Zones, Touring Corridors and Supporting Hinterland

1. Tourism Development Zones (Figure VI-3)

Tourism development zones are geographical areas where, due to the combination of the number and type of investment opportunities, the probability of success is generally high. The zone approach of concentrating development is a means of combining some of the advantages of locational free choice with those of directed growth.

Tourism development zones are based upon evidence that certain locations possess natural and man-made resources which give them strong foundations for tourism development.

The zone provides a framework for the development of most tourism activities. Tourists are participating in a greater variety of activities and are insisting upon a variety of attractions/services being made available at a single location. Although the concern of the individual operator is to obtain sufficient revenue to make his own operation viable, this revenue is usually dependent upon the variety and quality of the total tourism 'experience' in the vicinity.

Development zones include an existing tourism plant that has already demonstrated some viability and stability. If a new zone were created in

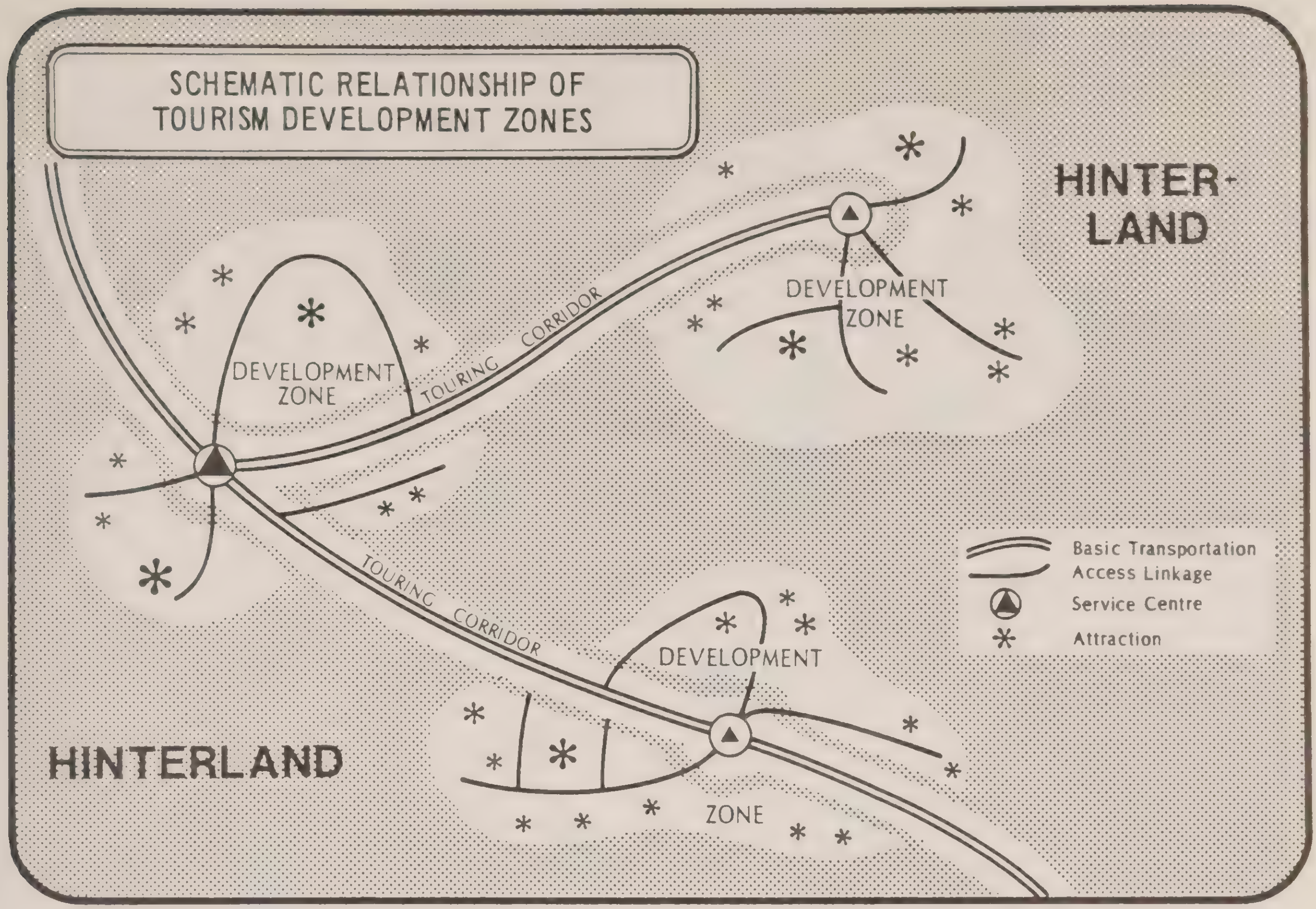
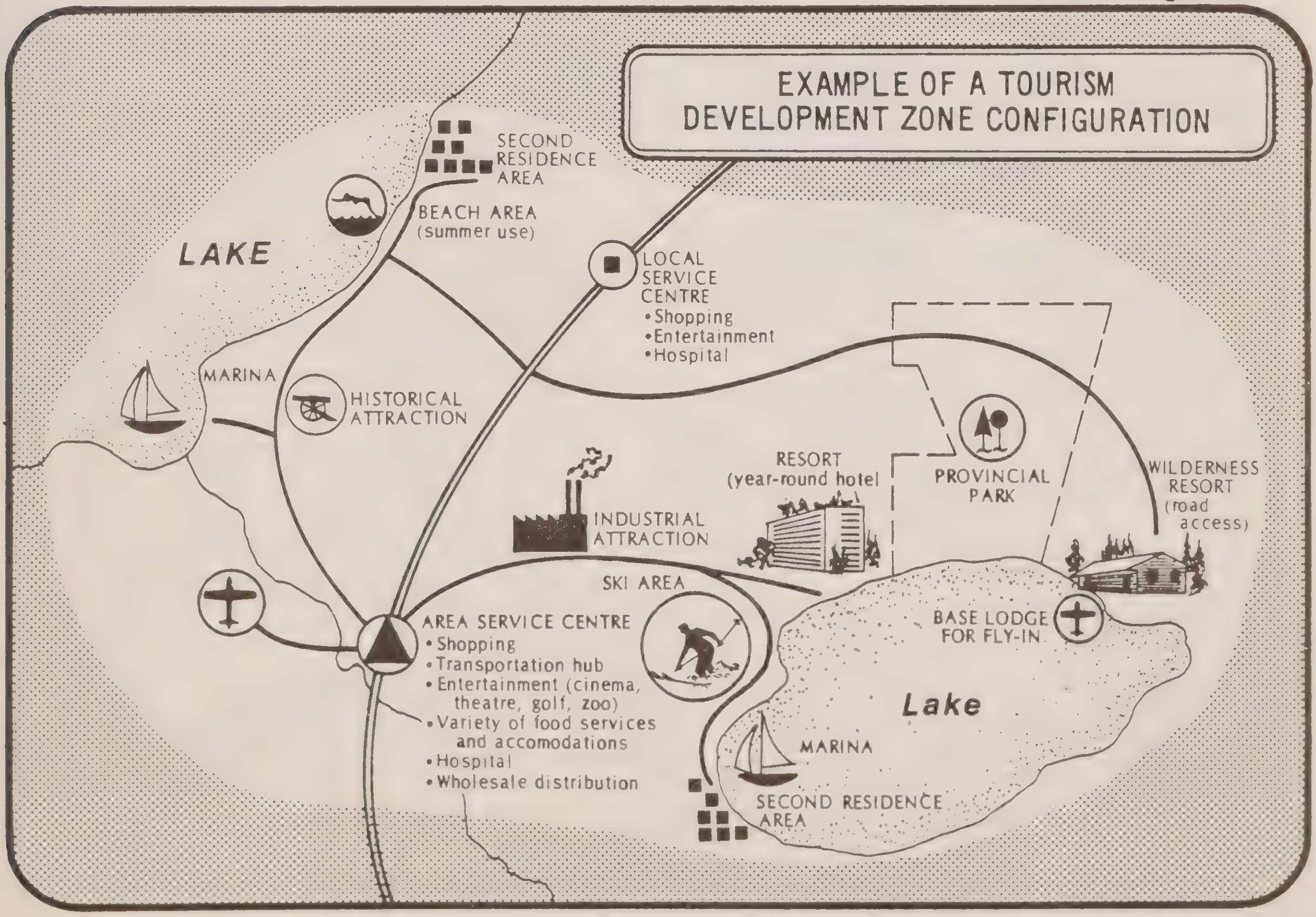
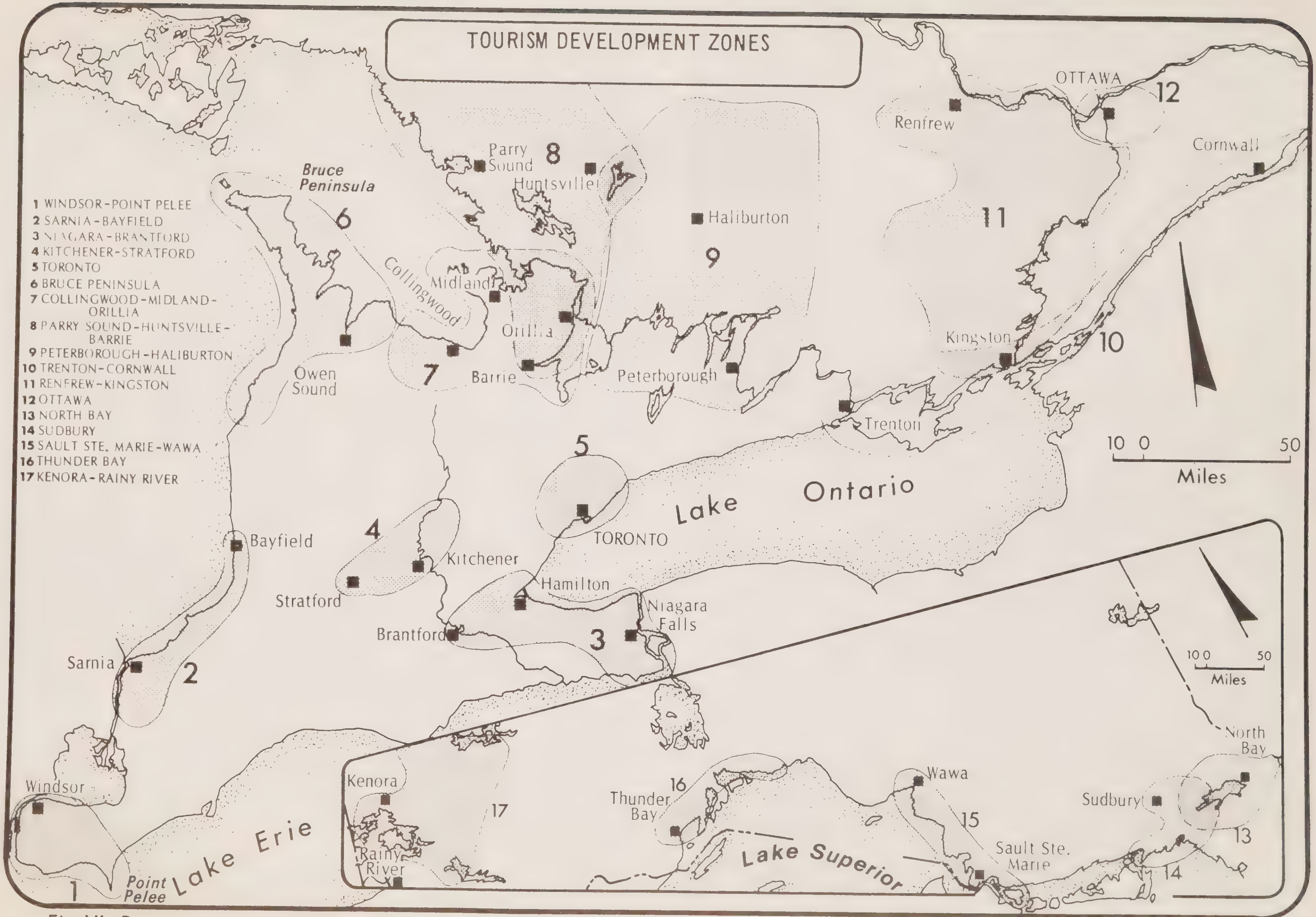


Fig. VI-1

Fig. VI-2




TOURISM DEVELOPMENT ZONES
1 WINDSOR-POINT PELEE
2 SARNIA-BAYFIELD
3 NIAGARA-BRANTFORD
4 KITCHENER-STRATFORD
5 TORONTO
6 BRUCE PENINSULA
7 COLLINGWOOD-MIDLAND-ORILLIA
8 PARRY SOUND-HUNTSVILLE-BARRIE
9 PETERBOROUGH-HALIBURTON
10 TRENTON-CORNWALL
11 RENFREW-KINGSTON
12 OTTAWA
13 NORTH BAY
14 SUDBURY
15 SAULT STE. MARIE-WAWA
16 THUNDER BAY
17 KENORA-RAINY RIVER
Bruce Peninsula
Owen Sound
Collingwood
Midland
Parry Sound
Huntsville
Orillia
Barrie
Haliburton
Peterborough
Trenton
Kingston
Renfrew
OTTAWA
Cornwall
TORONTO
Hamilton
Niagara Falls
Kitchener
Stratford
Brantford
Bayfield
Sarnia
Windsor
Point Pelee
Lake Erie
Lake Ontario
Lake Superior
Kenora
Rainy River
Thunder Bay
Wawa
Sault Ste. Marie
Sudbury
North Bay
10 0 50
Miles
Fig. VI-3

a presently undeveloped area, it would require: (a) an entirely new access from a transportation route; (b) a new array of attractions; (c) a new set of lodging, food and other supportive services; and (d) new community infrastructure. From the operator's perspective, it is generally easier to manage an operation located in conjunction with other attractions and services. For example, supplies are easier to obtain because they are wholesaled directly in the area, and skilled manpower is easier to obtain because a pool of manpower with the desired skills gravitates to the concentration of facilities and services.

Investment capital is easier to obtain for development in areas where an attraction/service core and market exists--'money attracts money'.

Capital intensive tourism development places emphasis upon the utilization of 'plant' capacity in order to produce enough revenue to warrant the large investment. The effects of seasonality can be reduced through the concentration of a wide variety of attractions and services--the 'critical mass' of diverse tourism plant attracts visitors year-round.

<u>2. Connecting Touring Corridors</u> (Figure VI-4)

The zones are linked together into a Province-wide system, and although the orientation of the operators in each zone will be to encourage more visitation in their particular zone, it must be recognized that there will be travel between zones. The linkages between zones and to border entry points are termed 'touring corridors'.

The corridors should be planned and developed to be scenic, convenient and efficient:

a. SCENIC--to make the travel experience interesting	THROUGH	·prohibiting 'ugly' structural development en route ·providing vistas so that interesting features and landscapes can be viewed from the transportation route
b. CONVENIENT--to ensure that en-route needs are met	THROUGH	·service nodes provided at regular intervals ·direct routings that do not force awkward linkages
c. EFFICIENT--to ensure that the traveller arrives at his destination at the intended time.	THROUGH	·improving reliability of air, bus and rail services ·good signing of routes ·good road maintenance

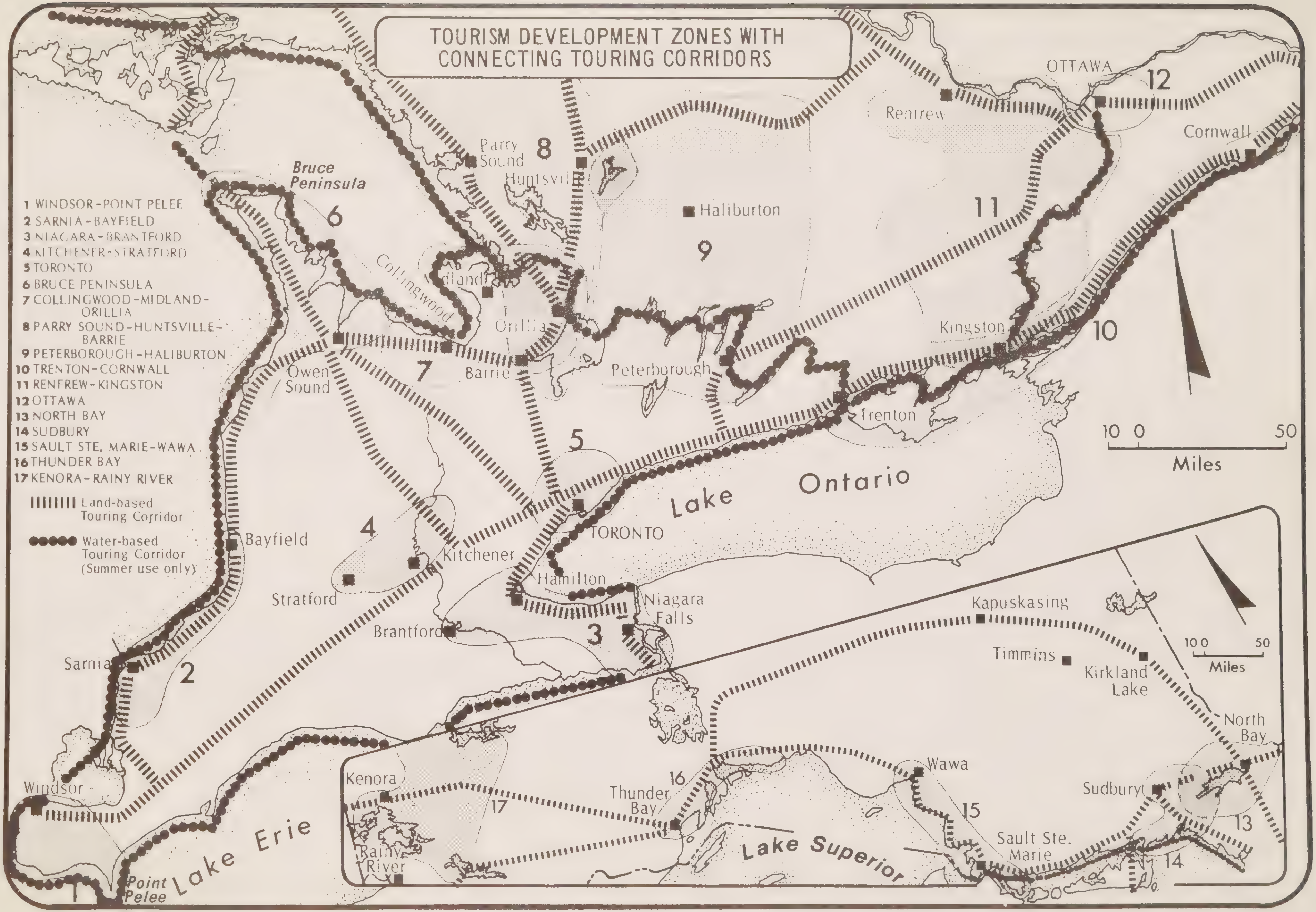

TOURISM DEVELOPMENT ZONES WITH CONNECTING TOURING CORRIDORS
1 WINDSOR-POINT PELEE
2 SARNIA-BAYFIELD
3 NIAGARA-BRANTFORD
4 KITCHENER-STRATFORD
5 TORONTO
6 BRUCE PENINSULA
7 COLLINGWOOD-MIDLAND-ORILLIA
8 PARRY SOUND-HUNTSVILLE-BARRIE
9 PETERBOROUGH-HALIBURTON
10 TRENTON-CORNWALL
11 RENFREW-KINGSTON
12 OTTAWA
13 NORTH BAY
14 SUDBURY
15 SAULT STE. MARIE-WAWA
16 THUNDER BAY
17 KENORA-RAINY RIVER
Land-based Touring Corridor
Water-based Touring Corridor (Summer use only)
Bruce Peninsula
Parry Sound
Huntsville
Haliburton
Renfrew
OTTAWA
Cornwall
Midland
Collingwood
Orillia
Owen Sound
Barrie
Peterborough
Kingston
Trenton
Lake Ontario
TORONTO
Hamilton
Niagara Falls
Kitchener
Stratford
Bayfield
Brantford
Sarnia
Windsor
Point Pelee
Lake Erie
10 0 50
Miles
Kapuskasing
Timmins
Kirkland Lake
North Bay
Sudbury
Wawa
Sault Ste. Marie
Thunder Bay
Lake Superior
Kenora
Rainy River
100 50
Miles

Fig. VI-4

These three criteria are, to some extent, conflicting. For example, a balance must be struck between the scenic possibilities of a corridor and the desire for an efficient route.

Touring corridors contain three main elements:

a. basic transportation routes;
b. a surrounding visual and accessible corridor with opportunities for egress and ingress to linear attractions; and
c. service centres for food, car service, first aid, souvenirs and lodging--concentrated at nodes rather than scattered along the travel route.

Touring corridors may utilize rail lines, waterways, high-volume, high-speed expressways, 'old' roads now bypassed by new routes or especially developed 'scenic' roads.

It is important to highlight that the touring corridors do have tourism potential. The focus should be on pass-through commercial and leisure travellers. Accommodation, food and modest attractions are potential opportunities for the private sector in the corridors

3. Supporting Hinterland

Not all tourism development will or should occur in zones, but development outside the zones will have a different character. Certain activities, because of their nature, would not likely take place in zones. Examples of this type of development are outpost camps for fly-in hunting, fishing and canoe tripping. The bases for this type of development may still be located in zones, to take advantage of the concentration of services. Service centres in neighbouring zones provide tourist services to the hinterland areas, and the hinterland provides extensive tourist opportunities (e.g., touring, hunting) for the neighbouring zone and visitors.

There will be investment opportunities in the hinterland to provide the services demanded by tourists--business travel, touring parties purposely searching for untravelled areas, etc.). This market is, and will continue to be, minor relative to the zone markets, even though it may be important within the local context. The kinds of development opportunities for the private sector in the hinterland market would usually be small-scale, and would feature basic traveller services (e.g., accommodation, food services).

4. Guidance to Investors

What can a businessman do once he has zones delineated for a large region such as the Province of Ontario?

First, he has a series of entitites that, by definition, have been identified because of much tourism logic--the very logic that is important to individual developers as well as for the good of society. In other words, these zones are very appropriate areas for tourism investment.

Second, the planner can test new development proposals against the well-formulated foundation of zones. For example, a new second residence developer can view the zones and research results from his own perspective. He may begin to discover other properties that may have greater land use logic for development than he had previously considered. A motel investor-developer may realize, through inspection of the context of zones, that his own location criteria are modified or shifted into new areas. For example, the Trent-Severn-Rideau corridor, because it has not been clearly understood as a special tourism attraction, now lacks overnight lodging accommodations at key locations, such as the nexus of highway, waterway, historic site, Provincial park and urban centre.

Third, he can more readily develop a policy that assigns action priorities. By identifying zones and their potential, he can assess the relative merits of future inputs of finance, local incentives and promotion. Development zones, by highlighting existing characteristics, indicate where comparatively little or great amounts of financial input would be required to make significant changes in tourism flows and economic impact. Detailed analysis of tourism development zones can identify those that may have either insurmountable political, environmental, traditional or social barriers to the developer's project; or those that need only minor change to make major improvement.

Fourth, he has a framework which can be placed against other development frameworks, such as for power generation, settlement, transportation, etc. Better integration of all components should result because of advance knowledge of the directions of each of the components.

C. Selection of Tourism Development Zones

1. Criteria

The following criteria were used in the identification of zones and are listed in order of importance:

1. Natural Resource Base:
   i) With the exception of urban-dominated zones, the zones should incorporate areas having high capabilities for intensive recreation. Concentrations offering potential for the development of year-round outdoor recreation opportunities should particularly be included.
   ii) Zones should contain natural landscapes which provide aesthetically appealing settings for tourism activities.

2. Population:
   i) Zones should be in close proximity to major markets (i.e., a large population with the desire and ability to participate) or be easily accessible.
   ii) Zones must have access to the labour market necessary to service the tourism plant.

3. Transportation:
   i) Zones should have access from or along major transportation routes.
   ii) Zones should be accessible by means of a variety of modes (airplane, bus, train, boat, as well as car) in order to draw upon a wide market and to remain easily accessible if automobile use declines.
   iii) Zones should be conveniently and safely accessible in winter if there are winter activities.
   iv) Zones should contain an efficient internal circulation network that incorporates the following considerations:
      a. existence of routes between attractions and service centres that are attractive as well as efficient;
      b. the availability of and potential for developing a variety of modes by which tourists may travel within the zones;
      c. the existence of and potential for developing tours which may utilize unique transportation means which relate to a zone's development theme or image.

4. Attractions/Events:

   i) Zones should contain attractions and events of Provincial significance to enable them to draw upon the Province-wide, national and international markets.

   ii) Zones should contain clusters of attractions/events, each of which is not necessarily of Provincial significance, but which as a cluster:

      a. exhibit a diversity of appeal;

      b. can be packaged to attract year-round visitation; and

      c. do not require the degree or scale of ancillary development needed by a series of dispersed single attractions.

   iii) Zones should, where possible, incorporate historical or cultural landscapes with the capability to engender tourism visitation by forming the basis for the development of historical and cultural attractions and events.

5. Image/Cohesiveness:

   i) Zones should have common features upon which to develop a regional identity (historical, cultural, physical, man-made, etc.) which can be readily associated with the geographic area.

   ii) Major administrative boundaries should be maintained, where practical, in order that zones may easily be recognized as cohesive development units by the agencies with an interest in tourism development.

6. Services/Facilities:

   i) Zones should contain service centres that are able to, or have the potential to provide good service to tourists and the tourism plant facilities in the area. The cost of establishing totally new service centres, especially at locations where the tourist trade is highly seasonal, is prohibitive.

   ii) Zones should contain service centres that can themselves provide potential attractions.

2. Identification of Tourism Development Zones: The 5-10 Year Outlook

The selection of the zones began by an overlay process using the following factors:

1. Natural resource capability for intensive and extensive recreation use;
2. Proximity to major population concentrations;
3. Transportation links;
4. Historical/cultural events and attractions;
5. Administrative boundaries;
6. Physiographic regions;
7. Accommodations;

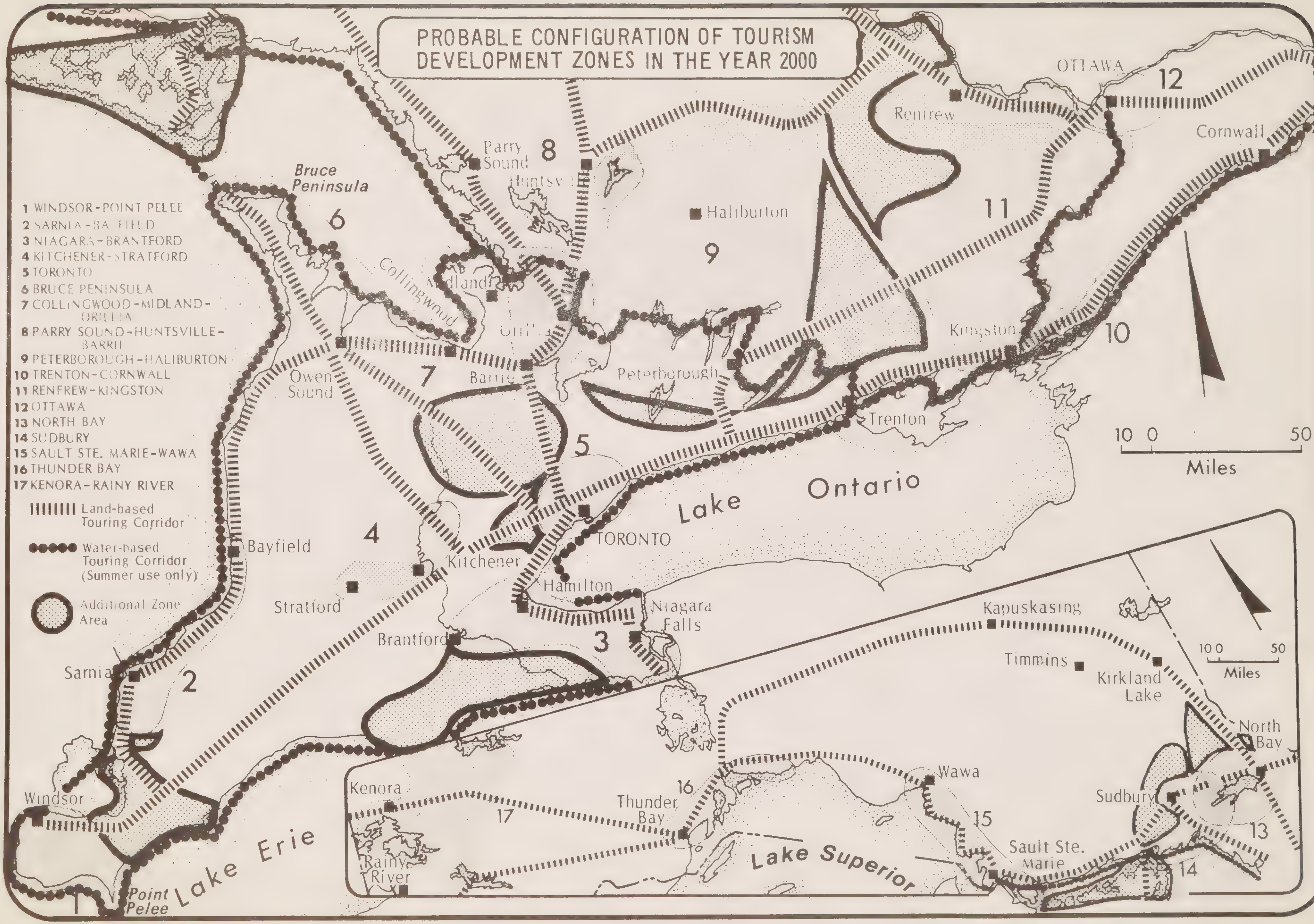
Utilizing these overlays and the six criteria outlined in Section C, the destination zones were identified by scanning through the transparent overlays. This overlay process brought a number of areas into focus. These areas were then considered in the light of certain aspects of the six criteria outlined in Section C which were not represented in the overlay process. The zones selected for the 5 to 10 year outlook are shown in Figure VI-3.

It is significant to note that the 17 zones account for between 70% and 80% of the total tourism revenues in the Province.

Zone boundaries outline the geographical area in which there is enough concentration of attractions and services to define a distinct and separate zonal identity. The boundaries of zones may overlap if there is a 'sharing' of service centres by zones possessing otherwise dissimilar characteristics, or if a particular area has been historically identified as being 'split' between two service and visitation 'watersheds'. Boundaries should be considered to be general (i.e., not running down the centre of a street, rather, being ten miles wide), so as to recognize that they are based upon both stable and variable factors.

3. Changes in Zone Boundaries: A Look Beyond 10 Years (Figure VI-5)

Because the criteria for setting the boundaries are dependent upon some factors that are variable, the boundaries will change over time.


PROBABLE CONFIGURATION OF TOURISM DEVELOPMENT ZONES IN THE YEAR 2000
1 WINDSOR-POINT PELEE
2 SARNIA-BAYFIELD
3 NIAGARA-BRANTFORD
4 KITCHENER-STRATFORD
5 TORONTO
6 BRUCE PENINSULA
7 COLLINGWOOD-MIDLAND-ORILLIA
8 PARRY SOUND-HUNTSVILLE-BARRIE
9 PETERBOROUGH-HALIBURTON
10 TRENTON-CORNWALL
11 RENFREW-KINGSTON
12 OTTAWA
13 NORTH BAY
14 SUDBURY
15 SAULT STE. MARIE-WAWA
16 THUNDER BAY
17 KENORA-RAINY RIVER
Land-based Touring Corridor
Water-based Touring Corridor (Summer use only)
Additional Zone Area
Bruce Peninsula
Parry Sound
Haliburton
Renfrew
OTTAWA
Cornwall
Collingwood
Midland
Kingston
Owen Sound
Barrie
Peterborough
Trenton
Lake Ontario
TORONTO
Bayfield
Kitchener
Stratford
Hamilton
Niagara Falls
Brantford
Sarnia
Windsor
Point Pelee
Lake Erie
10 0 50
Miles
Kapuskasing
Timmins
Kirkland Lake
North Bay
Sudbury
Kenora
Thunder Bay
Wawa
Sault Ste. Marie
Lake Superior
Rainy River
100 50
Miles
Fig. VI-5

Increasing demand will place growing pressure on the suggested tourism development zones. As they become more fully developed, their boundaries will expand into the extensively developed hinterland. By the year 2000 the hinterland, particularly between the zones that are located close to one another, will likely become intensively developed. As more tourists explore the regions on either side of the touring corridors, these areas, too, will likely become more highly developed and will eventually be recognized as destination zones. An outline of tourism development zones as they might appear in the year 2000 is shown in Figure VI-5.

D. General Development Directions for Zones

1. The zones should consist of attractions or clusters of attractions and should include primarily those locations with the highest activity, existing and potential.

   1.1 Natural resource attractions should be developed, improved or preserved in ways that will serve all the people of Ontario. While a certain proportion of the best hills, water and forests should be available to those who can afford to purchase and develop them for private purposes, a substantial amount of the best land and water areas should be maintained in public ownership for the enjoyment of those who cannot, or do not wish to, own land primarily for recreational purposes.

   1.2 Where a destination zone is defined by a number of attractions, they should relate ideally to marketable themes that capture the flavour of the area. Natural, historical, cultural and man-made points of interest or events all have a role in attracting the discretionary traveller.

2. Although accommodation and food services generate some travel on their own, they should be encouraged to locate in areas of high-commercial activity (the business traveller), areas having high leisure/tourism attractivity, or in the connecting corridors. Further specific direction as to types of accommodation and food services suggested for each zone will be contained in the individual zone tourism development plans (phase two).

2.1 A full range of accommodation and food services ('budget' to first class), complementary to the attractions and tourist activities of the area should be provided to encourage a diverse market.

2.2 Larger operations that combine accommodation, food and recreation services and which have the potential for year-round operation should be encouraged. It is important, however, to be aware that smaller and seasonal operations also have a significant role to play in the provision of accommodation.

3. Urban service centres in development zones must be recognized at all government levels as the preferred locations for the development of ancillary or support services for the tourism industry. In these centres entrepreneurs should be encouraged to provide a variety of services (e.g., food, accommodation, entertainment) on a year-round basis.

3.1 The provision of support services should be discouraged from taking the form of 'strip' development along major transportation arteries or at the perimeter of the service centre. They should be situated in the downtown or in conveniently located service plazas. Main travel routes should be well signed to direct non-residents to these downtown or service plaza locations. Adequate parking facilities must be provided in proximity to these service areas and these areas should be readily accessible by public transportation.

3.2 When possible, development in the service centre should reflect and support the development theme of the area in which the centre is situated. This should consist of the integrated theme development of the downtown core, outlying service plazas, information centres, attractions and main transportation arteries. Complete theming may take advantage of the architectural design of buildings, store fronts and attractions and landscaping as a means of creating atmosphere.

4. Information service should be made available at points of origin (directive) and at key 'entrance points' (receptive) on transportation networks throughout the Province.

    4.1 Attention must be given to 'entrance' development at all levels. The visitor must be made aware that he is entering the Province, a region or municipality, each of which exhibits a certain character. 'Entrance' development should prepare the traveller for and thus reinforce the development theme in any particular area. To this end it can incorporate not only signs, but also displays, information and service centres of appropriate design.

5. Industry support services (food wholesalers, laundries, etc.), high-volume sales (shopping, gift shops, etc.) and high-capacity utility services (roads, sewers, etc.) will inevitably cluster in existing urban service centres to take advantage of a resident, year-round and diverse market base. This natural, economic tendency will have some influence on tourism development decisions.

6. Development must be designed to enhance the setting in which it is located. Particular attention must be paid to ensure that the 'uniqueness' of the resource base is not destroyed by the development.

    6.1 Careful planning of all developments must include identification of affected unique features or landscapes, and then sensitively protect them.

    6.2 Local planning authorities must be contacted at the feasibility stage, in order to identify sensitive areas and development constraints. The interests and authority of provincial ministries in the protection of resources is summarized in Appendix E.

The examination of the guidelines related to supply components creates a number of points that are applicable to tourism development in general:

1. components of tourism supply are highly interrelated and the design of a destination area should be both comprehensive and sensitive to these interrelationships;

2. clustering of attractions/events, activities and support services and facilities appears to be more efficient than dispersed development;

3. tourism should develop around what exists because costs of totally new development are prohibitive; and

4. development must be well-conceived and ecologically sound in order that both the objectives of visitor use and preservation can be met.

The guidelines emerging from the consideration of the supply components and those resulting from the scrutiny of the preceding principles (i.e., policy issues, economic, social and environmental impacts and 'packaging' of tourism activities) have implications for a systematic approach to tourism development across the Province. These guidelines give substantial support to the utilization of a 'zone' framework for guiding tourism development and suggest considerations for the development of selection criteria for zone identification. The concept of zones and the identification and descriptions of zones in Ontario form the basis for detailed discussion in the ensuing chapter.

E. Development in Individual Zones

Each tourism development zone has an individual 'identity', based upon its particular resource base, attractions and services. Consequently, detailed tourism development planning must be done zone by zone.

It is the intention that each zone be developed to include a variety of attractions/services, thus encouraging more visitation (e.g., more visits, longer stays, larger visiting groups) and more expenditures. The visitor should feel that all attractions/services are integrated with the end result being a pleasant, enjoyable mix of experiences arranged to the convenience of the visitor.

In any one development zone there may be a number of development themes utilized. Keys to the success of any development theming are the quality and unique manner in which the theme is interpreted, and the completeness of its adoption among the appropriate attractions and services.

The theming of tourist development can serve to:

a. integrate different operations;

b. provide a more interesting and appealing experience to visitors, hence increasing visitation;

c. guide the design of new development and of redevelopment (i.e., improvement); and,

d. provide investors with clues as to the type of development which would be appropriate in an area (in the latter case, themes can also be restrictive to development).

It should be cautioned that marketing themes and development themes are not identical: marketing themes serve to create general mental images of the benefits of visiting an area, whereas development themes must be location specific, often to the level of a street or small district (e.g., Toronto's Yorkville).

The development themes appropriate for adoption in the Ontario Tourism Development Zones are outlined in Table VI-1.

TABLE VI-1

SUMMARY OF POSSIBLE DEVELOPMENT THEMES IN TOURISM DEVELOPMENT ZONES**

THEMES	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
HISTORICAL*																	
1. Pre-contact Native Tribes and Bands	2	2	2	2	1	2	1	1	2	1	1	1	1	1	1	1	1
2. Post-contact Tribes and Bands			3		2		1	1	2	2	2		1	1	1	1	1
3. Fur Trade and Fur Trading Communities	2	2	2		2		1	1	1	2	1	1	1	1	1	1	1
4. Agriculture and Agricultural Communities	1	1	1	1	1	3	2	1	1	1	1	2	3	3	2	3	3
5. Forest Industry and Forest Industry Communities						2	2	2	2	1	1	1					
6. Mining and Mining Communities	2	2	2						2	2	2	2	3	1	2	3	3
7. Transportation and the Integration of Economies and Communities																	
8. Military	2	1	1	1	1	2	2	2	3	1	3	3	2	2	1	2	2
9. Political	1		1		1		2			1					1		
					1						2	1					
ETHNIC																	
1. French	X											X	X	X		X	
2. Polish	X		X	X	X											X	
3. Ukranian	X				X											X	
4. Netherlands		X			X												
5. Italian			X		X										X		
6. German				X													
7. Chinese					X												
8. West Indian					X												
9. Finnish														X	X	X	
10. Native Indian			X		X		X								X	X	X

*Historical themes and rankings adapted from A Topical Organization of Ontario History. Historical Sites Branch, Division of Parks, Ministry of Natural Resources (now Heritage Conservation Division, Ministry of Culture and Recreation).

**Numerical symbols indicate the ranking of the development potential of theme for tourism (1--excellent potential, 2--good potential, 3--some potential); X symbol indicates themes that have development potential but are not ranked; absence of a symbol indicates limited potential for theme development.

continued . . . .

TABLE VI-1, continued

THEMES	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
AGRICULTURAL																	
1. Soft Fruit			X														
2. Market Gardening	X		X	X													
3. Horticultural	X		X														
INDUSTRIAL																	
1. Shipping	X	X	X		X					X					X	X	
2. Ship Building							X									X	
3. Steel			X												X		
4. Oil and Chemical		X															
5. Automobile	X				X												
URBAN MILEAU	X				X							X					
BORDER ENTRY	X	X	X		X					X		X			X	X	X
FESTIVALS/PERFORMANCES	2		1	1	1							1			2	2	

continued . . .

TABLE VI-1, continued

THEMES	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
NATURAL RESOURCES																	
1. Water Focus																	
a. Shoreline - Aesthetic			X			X	X	X	X	X	X		X	X	X	X	
- Beaches		X	X			X	X			X							
b. Lakes								X	X		X		X	X		X	
c. Canals			X					X	X		X						X
d. Rivers			X	X						X		X		X	X		
2. Aesthetic Natural Landscape Focus						X		X	X	X	X		X	X	X	X	X
3. Individual Natural Feature	X		X			X				X						X	
4. 'Accessible' Wilderness								X	X		X		X	X	X	X	X
5. Access to Wilderness													X	X	X	X	X

Theme possibilities related to specific recreational activities can be obtained from Table VI-2.

F. Ranking of Activities in Each Zone (Table VI-2)

The set of tourism activities was evaluated with respect to development potential in each zone. A four-level ranking was used:

Rank 1: (highest potential)

- existing facilities/services usually at capacity
- known expansion proposals unlikely to create significant excess capacity
- proximity to population concentrations of enough size to support further development
- high quality resource base
- ease of development

Rank 2: (good potential)

- some existing facilities/services with available excess capacity
- farther distance to major population concentrations

Rank 3: (some potential)

- large distance to major population concentrations
- resource base adequate for development

Unranked: (low potential)

- where no number appears, it is judged that the activity has low potential in that zone.

The overall potential market demand for each activity was also considered in the overall ranking (i.e., activities with rapidly expanding participation had higher rankings in more zones than did activities with lower potential demand). Relative cost of construction was not taken into consideration in these rating.

Activities with cross-hatching through all of the zones possess equal potential for development throughout all identified zones.

All zones can be considered to be 'preferential development zones' in that each one exhibits a high potential for development related to at least one activity. Some zones offer high potential for development of several activities (e.g., Collingwood-Midland-Orillia, Niagara-Brantford-Toronto) and the advantages of developing where a wide variety of opportunities are available have already been outlined.

Table VI-2 can be used from two perspectives. For example, if one is interested in developing a marina which specializes in houseboat rentals and service, information in the Table indicates that he should consider the following zones: First Priority--Peterborough-Haliburton and Trenton-Cornwall; Second Priority--Parry Sound-Huntsville-Barrie, Renfrew-Kingston and Kenora-Rainy River; Third Priority--Windsor-Point Pelee and Collingwood-Midland-Barrie. On the other hand, if one wishes to develop in a particular zone, Table VI-2 outlines those activities which offer potential for development in that zone. As has been previously stated, accommodation and food service development should occur in the zonal service centres, so that advantage can be realized from the variety of attractions and services focusing on those communities.

TABLE VI-2

ACTIVITIES IN TOURISM DEVELOPMENT ZONES RANKED BY POTENTIAL FOR DEVELOPMENT**

ACTIVITIES	TOURISM DEVELOPMENT ZONE																
	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	`Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
1. BOATING																	
A. Large Sailing Craft	1	1	1		1	1	1	2		1				1	3	3	2
B. Cruisers	1	1	1		1	1	1	1	1	1	1	2	2	1	2	2	2
C. Houseboats	3						2	2	1	1	2					3	2
*D. Canoes/Canoe Tripping								3	2		2		2	2	3	3	
E. Outboard Touring							1	1	1	1	1		2	2	3	3	2
F. Casual	3	3				2	1	1	1	1	1		2	2	2	3	2
2. FISHING																	
*A. Trip - Auto Access, Lodge							3	3	3		3		3	3			3
*B. Trip - Wilderness													3		2	2	1
*C. Ice							3	3	3		3		2	3			3
D. Casual	2	3	3			3	2	1	1	1	1		2	1	2	3	3

continued . . .

*Activities identified with asterisks are those that should take place outside of zones. Required support facilities/services (e.g., base lodges, transportation bases, etc.) should still be located in the zones whenever possible, but the actual participation in the activity usually takes place in the hinterland outside of zones.

**Numerical symbols indicate the ranking of the development potential for the activities (1--excellent potential, 2--good potential, 3--some potential); absence of the symbol indicates limited potential for activity development.

TABLE VI-2, continued

ACTIVITIES	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
3. HUNTING																	
A. Big Game *Moose													3	3	1	1	1
*Deer						3		2	2		2		2	3	3	3	2
*Bear													3	3	3	3	3
*B. Wild Fowl																	
C. Small Game ***																	
4. SKIING																	
A. Downhill							1				3	3			2	3	
B. Cross Country			3			2	1	1	1	3	2				3	3	
5. OTHER OUTDOOR RECREATION																	
A. Nature Based - Swimming		1	3			2	1			1			3				
Major Beach						1	2	2	2		1						
Hiking																	
Water Skiing																	
Scuba Diving						2									3	3	
Snowmobiling						2	2	1	1	3	2		3	3	3	3	
B. Organized, Facility Oriented or Club																	
6. VIEWING NATURAL ATTRACTIONS	3		1	3		2	3	3		2	3				2	3	
7. SHOPPING	1	2	2	2	1	3	3	3	3	3	3	2	3	3	3	3	3
8. EATING OUT	2	2	1	1	1	3	2	3	3	2	3	1	3	3	3	3	3
9. SPECIAL EVENTS																	

*** development potential exists in all zones.

continued . . .

TABLE VI-2, continued

ACTIVITIES	Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
	TOURISM DEVELOPMENT ZONE																
10. MAN-MADE ATTRACTIONS																	
A. Industrial	1	1	1	3	1	3	3			3		2		2	3	3	
B. Educational			3	3	1							1					
C. Amusement	1	2	1		1		2			3		3					
D. Historical	2	3	1	2	2		3		3	1	1	2	3	3	3	2	
11. EN ROUTE ELSEWHERE	1	3	1		1	3	2	2		1	3	2	3	3	2	3	3
12. BUSINESS (TASK)																	
A. Route Task																	
B. Single Task	2	2	2	2	1							1	3	2	3	3	
13. BUSINESS EVENT																	
A. Convention - Urban	3		2		1							2				3	
B. Convention - Non-Urban							1	1	1	1	2				3		
C. Small Meeting, Retreat	2	3	1	2	1	3	2	2	2	2	2	1	3	3	3	3	3
14. SECOND RESIDENCE																	
A. Lakeshore	3	3	3			1	3	2	1	3	1		2	2	2	2	2
B. Upland						2	1	1	1		2		3	3	3		
15. VISITING FRIENDS AND RELATIVES																	
A. Passive																	
B. Active																	

continued . . .

TABLE VI-2, continued

ACTIVITIES	TOURISM DEVELOPMENT ZONE: Windsor-Point Pelee	Sarnia-Bayfield	Niagara-Brantford	Kitchener-Stratford	Toronto	Bruce Peninsula	Collingwood-Midland-Orillia	Parry Sound-Huntsville-Barrie	Peterborough-Haliburton	Trenton-Cornwall	Renfrew-Kingston	Ottawa	North Bay	Sudbury	Sault Ste. Marie-Wawa	Thunder Bay	Kenora-Rainy River
16. RESORT VACATION																	
A. Resort Hotel						3	1	1	1	2	2				3		
*B. Wilderness (Road Access)								2	2				1	1	1		2
C. Special Purpose						1	1	1	1	1	1		2	2	2	3	3
17. CAMPING																	
A. Destination																	
*B. Wilderness								2	2		2		3	2	3		
C. Touring	2	3	2		1		2	2		2	3	1	3	3	3	3	3
18. URBAN EXPERIENCE	2		3		1							2					
19. TOURS (GROUP)																	
A. Affinity																	
B. Special Interest																	
C. General																	
20. AUTO TOURING	3	3	1	2	1	2	1	1	2	1	2	1	3	3	2	3	3

G. Detailed Studies of Individual Tourism Development Zones

This present study is confined to a general Provincial overview. It outlines geographic zones which should interest the private investor, and suggests what activities merit closer study. Therefore, this study is an important contribution to the investor interested in an organized survey of business development opportunities.

The next step must be a detailed study of the zones with the objective of identifying specific investment opportunities for the private sector.

An outline of each zone follows, including its current supply base, tourist patterns, and potential for development.

1. Windsor-Point Pelee

Tourism-related development in Windsor - Point Pelee centres largely around Windsor and the Lake Erie shoreline. This zone currently contains a mix of relatively small-scale attractions and events which are based on natural, historical and cultural features. The Windsor area exhibits an urban appeal with support facilities and services that are year-round in nature. The developments along the Lake Erie shoreline, on the other hand, are seasonal focussing primarily on natural attributes. There appears to be little integration of individual tourism components, however this is possible using themes as a basis for development. Table VI-3 provides a description of existing development within this zone, which is outlined in Figure VI-6.

Access from major U.S. and Ontario markets to the Windsor - Point Pelee zone is excellent throughout the year. Visitors are able to take advantage of a variety of travel modes to enter this area (i.e., automobile, bus, rail, air and boat).

This southern development zone is characterized as a short-term destination by American visitors. The U.S. resident accounts for approximately 75 percent of the total visitation, Ontario residents comprise 20 percent, and other Canadian visitors represent 3 percent. Most U.S. visitors (87%) stay less than one day. Those visitors remaining longer use the home of friends or relatives, their own cottages or hotels/motor hotels/ motels as the preferred accommodation. The Ontario visitors tend to stay for longer time periods, residing primarily with friends or relatives, in cottages/chalets/hobby farms or travel trailers.

Tourist receipts in the Windsor - Point Pelee zone totalled $87,282,000 in 1973. Expenditures by U.S. tourists accounted for 78 percent, the Ontario resident for 16 percent, and other Canadian visitors for the remaining 6 percent.

Visiting friends and relatives is the activity that attracts high percentages of both U.S. and Ontario residents to this zone. Other activities which draw considerable U.S. visitation are spectator sports, specialized shopping and fishing. Relatively large numbers of Ontario visitors are attracted by cottaging and camping. Table VI-4 elaborates on the current market travel patterns in this zone.

DESTINATION ZONE MAPS

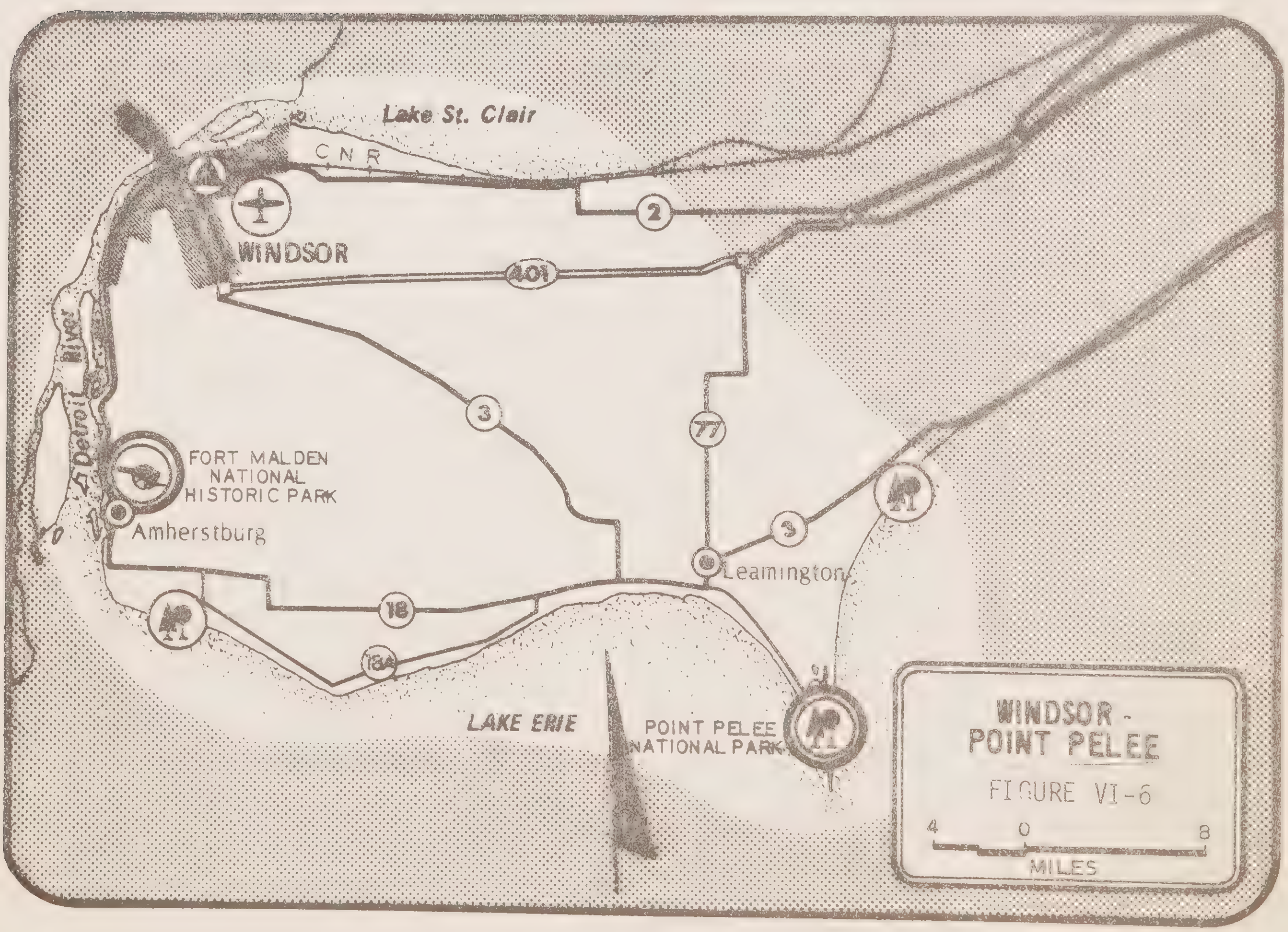
MASTER LEGEND

Transportation Facilities

- 401 Multi-lane Divided Highway
- 7 Major Two-lane Highway
- 503 Other Highway
- Rail Passenger Service
- Navigable Canal
- International Airport
- Interprovincial Airport
- A Other Airport
- International/Provincial Border Entry Point

Service Centres and Facilities

- Provincial Centre
- Sub-Provincial Centre
- Regional Centre
- Area Centre
- Local Centre
- National Park
- Provincial Park
- Major Beach
- Major Attraction
- Attraction Cluster
- E Major Event
- EEE Event Cluster



WINDSOR - POINT PELEE

FIGURE VI-6

TABLE VI-3

ZONE SUPPLY INVENTORY - WINDSOR-POINT PELEE

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. concentration of high ranking features, but lacks variety . a number of the existing attractions are based on the natural resources/wildlife areas in zone, i.e., Point Pelee National Park, Jack Miner's Bird Sanctuary, Holiday Beach Provincial Park, etc. . boating is an important outdoor activity in this zone and some cottaging occurs along Lake Erie shoreline	. some attractions in the Windsor area capitalize on the military historical theme, i.e., Fort Malden National Historic Park at Amherstburg, International Freedom Festival at Windsor, Talbot Trail, etc. . rich in historical themes of significance, although much of the resource base has been destroyed . significant concentrations of persons of French, Polish and Ukrainian origin . rural landscape with potential for some development based on greenhouses and agricultural production	. Windsor serves as a regional service centre with Leamington and Amherstburg acting as local centres . Windsor - approximately 1,600 year-round accommodation units; a convention centre, with a good range of dining/entertainment/shopping opportunities . concentration of around 400 private campsites around Windsor . two Provincial parks with campsites in zone	. served by the South-western Ontario Travel Association . travel information centre at Windsor	. excellent access via road (Highways 401, 2, 3 & 18), rail (C.N.R., New York Central) and air (Provincially significant airport at Windsor) . boat access at Windsor, Amherstburg, Kingsville and Leamington. Boat travel along Lake Erie coast-numerous marina developments . border entry point at Windsor . good internal road network and scenic coastal road (Heritage Highway)	Population - approximately 322,000 Age breakdown 0-14 years, approx. 30% 15-24 years, approx. 20% 25-54 years, approx. 31% over 54 years, approx. 19% . excellent scheduled bus service to and from major centres, including the U.S.A.

TABLE VI-4

CURRENT TOURIST MARKET PATTERNS IN THE WINDSOR - POINT PELEE ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Visitation is dominated by the U.S. visitor 75% with the Ontario resident 22% and other provinces 3% U.S. Visitors Michigan 87% few from other states Ontario Residents Lake St. Clair 36% Lake Erie 19% for vacations Central Ontario 50% on weekends	Usage occurs year-round in the urban centre, with the visitation to the surrounding area mainly in summer with some visitation in the shoulder seasons U.S. Visitors Trip Purpose: commuting to or from work 26% other non-business 23% visit friends/relatives 22% Activities: attend spectator sports 20% specialized shopping 20% fishing 10% Ontario Residents Activities: visit friends/relatives 49% cottaging 17% camping 13%	U.S. Visitors home of friends/ relatives 45% own cottage 22% hotel/motor hotel/motel 20% Ontario Residents home of friends/ relatives 50% cottage/chalet/ hobby farm 21% travel trailer/ mobile home 18%	Ontario Residents automobile 87% bus 10% rail 3%	U.S. Visitors 0 nights 87% 1 night 9% 2 nights 2% Ontario Residents 1 week 40% 4-6 days 25% 2 weeks 24% length of stay for Ontario residents is considerably longer than for U.S. visitors mostly day visits for U.S. visitors	U.S. Visitors Party size of 2 persons 42% mainly families 46% couples 30% Age: weekend trips 20-34 years 34% vacations 34-49 years 33% Education: mainly high school 68% for weekends 50% for vacations Income: $10,000-$14,999 weekend trips 40% vacations 31% Ontario Residents Party size 2 persons weekends 39% vacations 42% mainly families weekends 42% vacations 46% Age: 20-34 years 34% for weekend trips 35-49 years 33% for vacations Education: mainly high school for weekends 68% vacations 50% Income: $10,000-$14,999 weekends 40% vacations 31%	U.S. Visitors $68,130,000 other non-business 27% visit friends/ relatives outdoor recreation/ own cottage/ resort 13% Ontario Residents $13,626,000 visit friends/ relatives 29% sightseeing/ touring/Niagara Falls 16% Other Provinces $5,526,000 visit friends/ relatives 45% sightseeing/ touring/Niagara Falls 24%

Visitation to Windsor, because of urban-related activities, occurs year-round. On the other hand, travel to the surrounding area takes place mainly in the summer with some cottage visitation in the 'shoulder season'.

The lack of major large-scale attractions is probably a primary reason of the short length of stay by visitors. Complaints, by visitors, indicate a need for more hotel/motel accommodation in the Windsor area, and additional, larger scale marina facilities within the zone.

Future Potential

This zone should capitalize on its proximity to major markets and year-round accessibility to attract visitors during all four seasons. In order to increase visitor length of stay and capture the large number of en route traffic flowing through this zone, major development is necessary. Opportunities for urban-related activities (i.e., shopping, entertainment and eating out) and the supportive infrastructure should be expanded and diversified. Major attractions and events utilizing themes such as historical (military), agricultural (market gardening and horticultural) and industrial (automotive and shipbuilding) could be integrated into future development. Events that would occur in the 'shoulder' and winter season particularly need consideration.

Recreational boating is a natural resource-based activity which could enjoy tremendous success in this region. The activity could benefit from a provision for larger scale marinas and more rental services. Public access to the shoreline should, however, also be maintained for those interested in viewing natural attractions.

Recommended tourism-related service centres include Windsor, Amherstburg and Leamington.

2. Sarnia-Bayfield

The majority of existing recreational opportunities and support facilities and services in this coastal zone are concentrated along the Lake Huron shoreline from Sarnia to Bayfield. Figure VI-7 illustrates the geographical location of existing development, and Table VI-5 presents a detailed supply inventory. The appeal of the Sarnia - Bayfield zone lies in the potential of the natural resource base for supporting intensive and extensive outdoor recreation activities such as boating, cottaging, camping, resort vacations, beaching and swimming. A number of attractions, based on the petro-chemical industry, can be found in the southern extremity of the zone. Sarnia exhibits some drawing power as an urban centre.

Support facilities and services are mainly seasonal in nature and consist largely of direct services. In Sarnia, however, the supportive tourism plant is year-round in character.

U.S. and Ontario residents are the main markets, respectively comprising 48 and 49 percent of the total visitation. The remaining visitors (3%) come from other Canadian provinces. Nearly all U.S. visitors originate in the State of Michigan. Current travel patterns are outlined in detail on Table VI-6.

Cottaging and visiting friends or relatives are the main trip purposes. Thus, visitation to the area occurs primarily in the summer and the 'shoulder season'. A high percentage of Americans are interested in specialized shopping, attending special events and swimming. Considerable numbers of Ontario residents fish in the region.

Length of stay for the majority of Americans is extremely short-term (81% do not stay overnight). The preferred accommodation by Americans who remain longer than one day are private cottages, homes of friends or relatives and trailer parks. Ontario residents list cottages/chalets/hobby farms as the accommodation most often used. Their length of stay tends to exceed that of the American visitor (nearly 60% remain 4 days or longer).

Total annual tourist expenditures in Sarnia - Bayfield were $19,677,000 in 1973. U.S. visitation realized 47 percent of the revenue; visitation by Ontario residents, 46 percent; and 7 percent from other Canadian provinces.

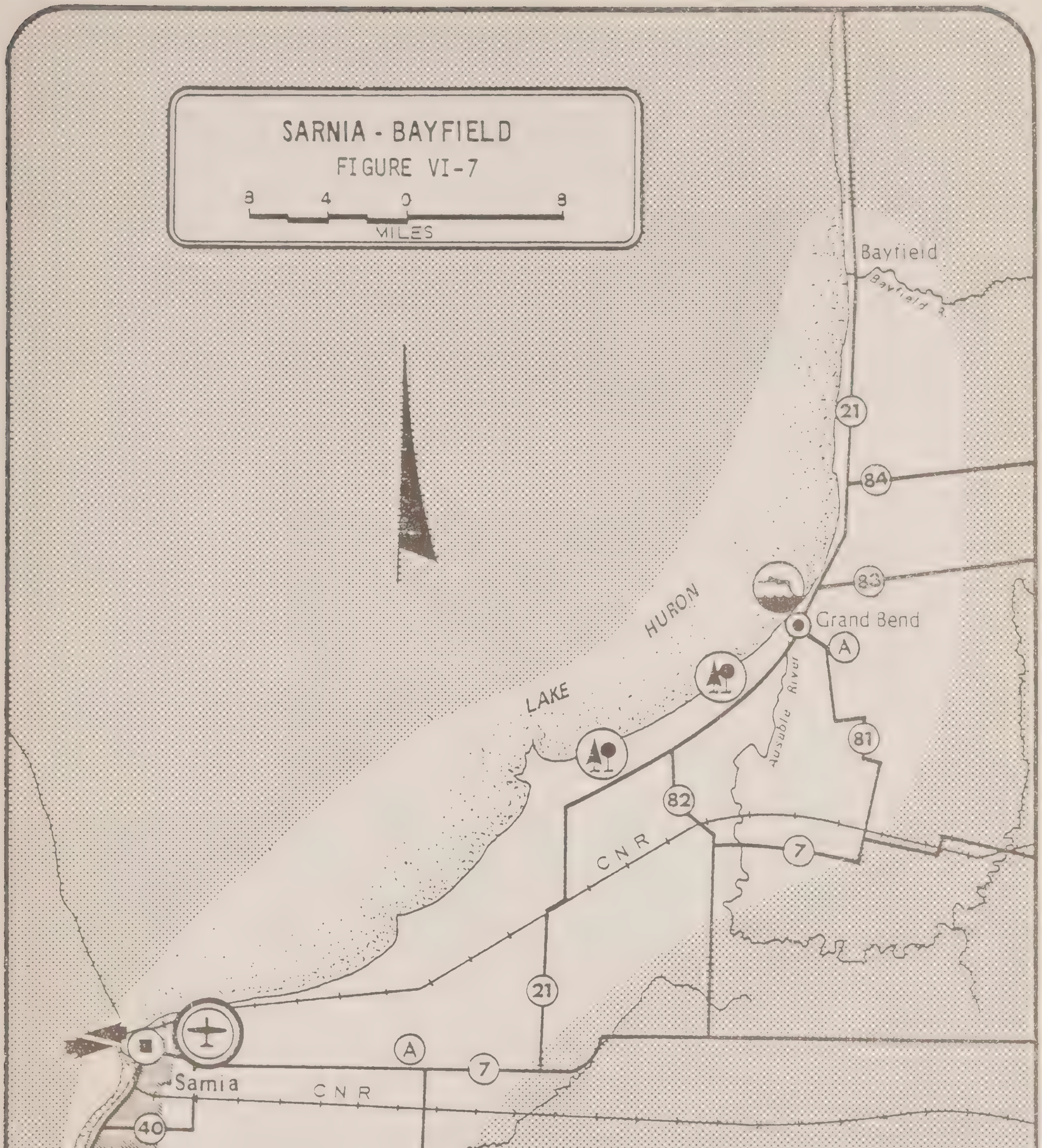

SARNIA - BAYFIELD
FIGURE VI-7
8 4 0 8
MILES
Bayfield
Bayfield R.
21
84
83
Grand Bend
A
Ausable River
81
LAKE HURON
82
CNR
7
21
A
7
Sarnia
CNR
40
40
21
Creek
80
Bear

TABLE VI-5

ZONE SUPPLY INVENTORY - SARNIA-BAYFIELD

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. all of recreational opportunities centred around the natural resource base and major attractions are based on natural resources . a number of high ranking features which offer potential for intensive recreation (swimming, camping, boating) . sand dunes at Grand Bend . scenic shoreline drive . lacks variety of features	. only other major attraction is industrial - Oil Museum of Canada . potential for developing attractions and tours around shipping industry	. Sarnia is an area service centre and Grand Bend is classified as a local service centre . Sarnia - direct services, especially for U.S. visitors; approximately 850 year round accommodation units; some shopping/dining/entertainment facilities . numerous small centres provide essential services . London, although outside of zone, provides many services to zone visitors . 2 provincial parks with campsites . concentration of cottages/second homes along shoreline, especially heavy south of Grand Bend	. located within the South Western Ontario Travel Association . travel information centre at Sarnia	. good road access (Highways 7, 21, 40, 81) . good access via rail and bus . internal road network is relatively dense . scenic drive along coast (Bluewater Route) . border crossing at Sarnia . Provincially significant airport at Sarnia (direct flights to Toronto and London . two other airports within services located in zone . 5 marinas along southern Lake Huron to Grand Bend . winter access is periodically less adequate due to climatic conditions	Population - approximately 118,000 Age breakdown 0-14 years - approx. 27% 15-24 years - approx. 20% 25-54 years - approx. 35% greater than 54 years approx. 18%

TABLE VI-6

CURRENT TOURIST MARKET PATTERNS IN THE SARNIA - BAYFIELD ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISITCS	EXPENDITURES
The U.S. resident 48% and Ontario resident 49% are main visitation markets approximately 3% of the visitors are from other provinces. U.S. Visitors Michigan 94% few from other states Ontario Residents for weekend trips Central Ontario 31% and Lake St. Clair 28% for vacations Lake St. Clair 43% and Mid-western Ontario 28%	with cottaging and visiting friends/ relatives the main activities usage occurs largely in the summer and shoulder seasons U.S. Visitors Trip Purpose: business 38% visit friends/ relatives 21% other business 9% Activities: specialized shopping 49% special events 19% swimming 12% Ontario Residents Activities: cottaging 38% visiting friends/ relatives 26% fishing 13%	U.S. Visitors own cottage 42% home of friends/ relatives 15% trailer park, campsite 14% Ontario Residents cottage/chalet/ hobby farm 70% other 16% home of friend/ relative 7%	Ontario Residents automobile 97% bus 3%	U.S. Visitors 0 nights 81% 1 night 7% 4 or more nights 5% average number of nights in Ontario per party 5 by those staying more than one day Ontario Residents 1 week 30% 4-6 days 29% 1 day 12%	U.S. Visitors Age: 20-34 years 27% 45-64 years 25% Income: $15,000-$24,999 35% Ontario Residents Party size: 2 persons 53% mainly families 42% for weekend trips & 32% for vacations Age: weekend trips 20-34 years 36% vacations 50-64 years 28% Education: mainly high school 67% for weekend visitors and 72% for vacationers Income: majority fall into $10,000-$14,999 39% for weekend and 60% for vacations	U.S. Visitors $9,277,000 visit friends/ relatives 38% outdoor recreation/own cottage/ resort 19% Ontario Residents $9,008,000 visit friends/ relatives 33% sightseeing/ touring/Niagara Falls 23% Other Provinces $1,392,000 visit friends/ relatives 53% other business 27%

A number of problems that have been identified in this zone are:

1. accommodations and eating out opportunities are lacking in variety, quantity and quality;
2. better public access to the shoreline is desired;
3. erosion of beach areas makes development difficult; and
4. there are insufficient marina facilities along the coast.

Future Potential

The Sarnia - Bayfield zone lies in close proximity to major markets, but potential for year-round development is limited because of the largely water-oriented outdoor recreation opportunities that are restricted to the summer and 'shoulder season' by climatic constraints. The shoreline area, in particular, will probably retain a summer focus with some potential for increasing visitation during the 'shoulder seasons' based on extended use of cottages and resorts. The tourism industry could capitalize more on summer visitation and en route traffic by improving and further developing water-oriented support facilities and services (especially accommodation, marinas and eating out opportunities). The development should be situated back from the shoreline since the key to maintaining an attractive coast is careful management and protection of the lakeshore.

Sarnia and the southern segment of the zone exhibit some potential for attracting year-round visitation, based on the development of large-scale attractions and events incorporating industrial themes (i.e., shipbuilding and petro-chemical industry). Sarnia's appeal as an urban centre could be increased by diversifying the shopping, entertainment and dining opportunities.

3. Niagara-Brantford

This zone offers an outstanding concentration of provincially-significant natural and man-made attractions and numerous events. Niagara Falls is the regional focal point, around which a large number of other attractions and events gravitate (i.e., parks, historic sites, and amusements). The other man-made developments situated within Niagara-Brantford centre on historic, cultural, ethnic, industrial and natural features. Events and festivals focus on similar themes. Both attractions and events are clustered around the zone's service centres (Niagara-on-the-Lake, St. Catherines, Hamilton and Brantford) and along the Lake Erie shoreline between Fort Erie and Port Colbourne. The supportive infrastructure in most centres is year-round in nature. Only along the Lake Erie shoreline is the existing tourism plan highly seasonal. Both the agricultural interior and the Lake Ontario shoreline are relatively undeveloped from a tourism perspective. Table VI-7 and Figure VI-8 present detailed and graphical illustrations of the existing development in Niagara-Brantford.

Throughout the year this zone is readily accessible from major Ontario and U.S. population concentrations. Although auto travel is the most popular mode of transportation to the zone, entry can also be gained via bus, rail, air and boat.

Table VI-8 identifies, in detail, current market travel patterns in Niagara-Brantford. The main interests of all market groups relate to viewing Niagara Falls and visiting friends and relatives. Other activities in which the many visitors participate are attending special events, specialized shopping, camping and visiting historic sites.

Ontario and U.S. residents are the largest market groups, each representing 47 percent of the total visitation. Both groups remain for relatively short time periods; 59 percent of the Americans do not stay overnight, while 44 percent of the Ontario residents are in the area for less than 3 days. Considerable percentages of American travellers tend to stay in hotels/motels, homes of friends or relatives, or their own cottages in descending order of importance. Ontario residents, on the other hand, prefer homes of friends or relatives (59%), hotels/motels (12%), and tents or trailers (11%).

Tourism receipts in this zone in 1973 were second only to those in Toronto, totalling $228,484,000. Although U.S. and Ontario residents

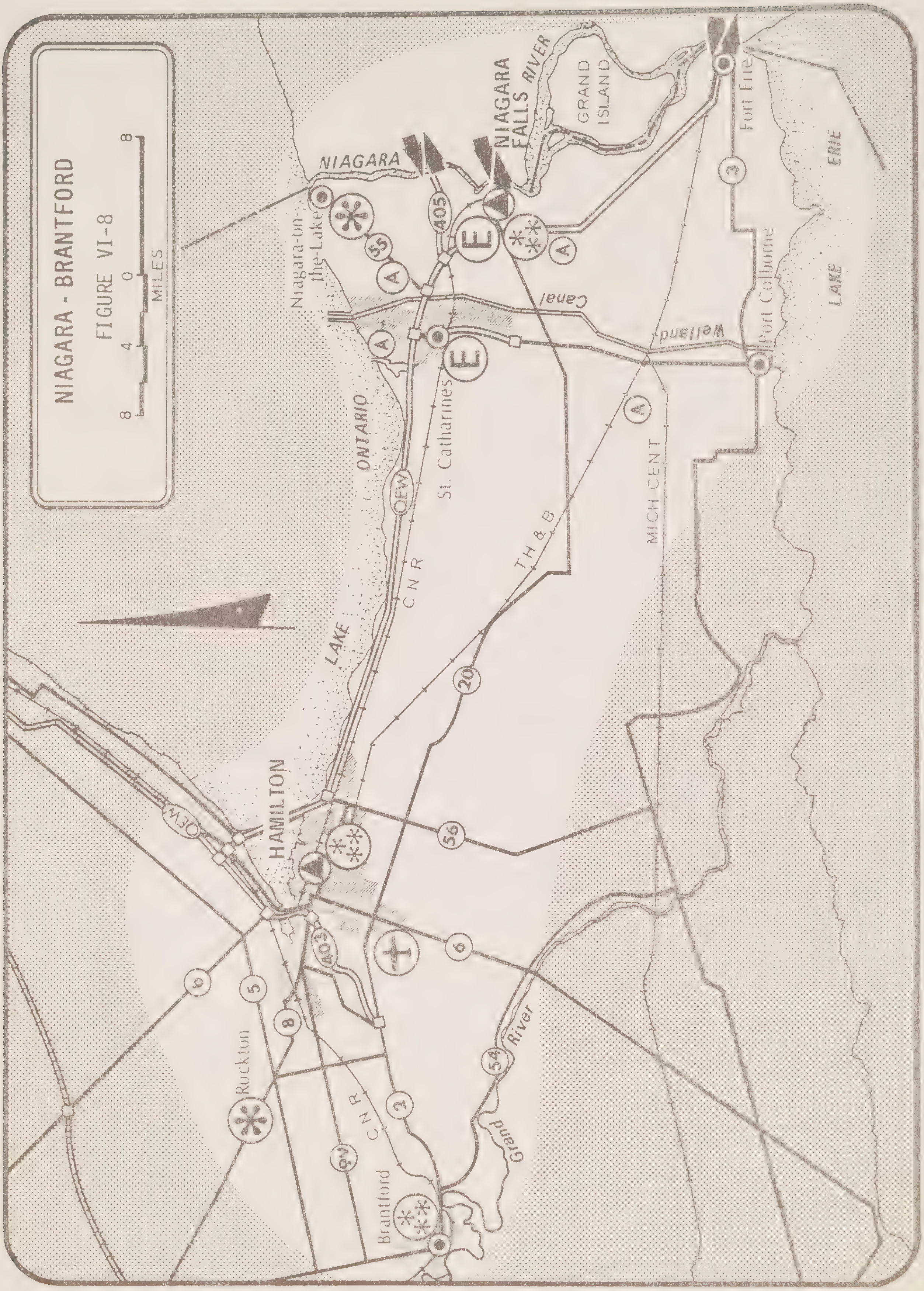

NIAGARA - BRANTFORD
FIGURE VI-8
8 4 0 8
MILES
NIAGARA RIVER
NIAGARA FALLS
GRAND ISLAND
Niagara-on-the-Lake
Fort Erie
Welland Canal
Port Colborne
LAKE ERIE
LAKE ONTARIO
St. Catharines
QEW
CNR
TH & B
MICH CENT
HAMILTON
Rockton
Brantford
Grand River

TABLE VI-7

ZONE SUPPLY INVENTORY - NIAGARA-BRANTFORD

<table>
<tr><th>NATURAL FEATURES</th><th>HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES</th><th>SUPPORT SERVICES</th><th>INFORMATION SERVICES</th><th>TRANSPORTATION</th><th>INTERNAL POPULATION</th></tr>
<tr><td rowspan="3">Niagara Area
. focal point of zone is internationally known natural feature - Niagara Falls
. Niagara Park and Niagara Escarpment also important natural features
. due to natural features, Niagara area offers exceptional opportunities for intensive recreational activity on a year-round basis
. Niagara Escarpment is only sensitive area - therefore, development should be cautionary
. major beach area at Crystal Beach
. surrounding rural landscapes in Niagara area also hold tremendous appeal, especially during blossom time
. agricultural landscape of aesthetic appeal (soft fruit belt)</td><td rowspan="2">. strong historical/cultural themes based on Loyalist settlement, transportation military and historical Indian populations
. around the Brantford area, centred around the Mohawk Indians
. historical and cultural attractions & events in Hamilton
. a cultural emphasis at Niagara-on-the-Lake
. in the Hamilton/Brantford area, significant concentrations of people of Polish origin, and around Niagara, large numbers of Italians
. festivals, with a recreational and cultural emphasis prominant</td><td>. Hamilton and Niagara Falls serve as regional service centres
. local centres include St. Catharines, Port Colborne, Brantford, Niagara-on-the-Lake and Fort Erie</td><td>. served by the Niagara and Mid-Western Ontario Travel Association
. Travel Information Centres at Niagara Falls and Fort Erie</td><td>. all of zone serviced by major road and rail routes (i.e., Q.E.W. and C.N.R.)
. excellent scheduled bus services
. airport of Provincial significance at Hamilton
. boat access from Lake Erie and Lake Ontario
. internal transportation fairly good at Niagara Falls and Hamilton
. border points - good access for U.S. market
. excellent year-round access</td><td>Population approximately 841,000
Age breakdown
0-14 years - approx. 27%
15-24 years - approx. 19%
25-54 years - approx. 38%
greater than 54 years - approx. 16%</td></tr>
<tr><td colspan="4">. two border entry points: Niagara Falls and Fort Erie
. Hamilton: a convention centre with a high diversity of dining/shopping/entertainment facilities - approximately 900 hotel/motel units - a moderate number of campsites - large number of indirect services
. Niagara Falls: a wide variety of dining, entertainment and shopping opportunities
. offers approximately 600 hotel/motel/resort units, mostly year-round, and a significant number of campsites
. Toronto serves as an external service centre</td></tr>
<tr><td colspan="5">. high concentration of major recreation-oriented attractions and events with an emphasis on viewing, centred around Niagara Falls, Hamilton and Welland
. industrial attractions at Hamilton (i.e., steel mills)
. year-round potential in this zone, that is currently under-utilized</td></tr>
</table>

TABLE VI-8

CURRENT TOURIST MARKET PATTERNS IN THE NIAGARA - BRANTFORD ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Approximately 47% of the visitors are from Ontario 47% from the U.S. 6% from other Canadian provinces U.S. Visitors New York 66% Michigan 8% remainder spread out over other states Ontario Residents Central Ontario 53% for weekends 29% for vacations Niagara 15% for weekends and 14% on vacations	For all market groups main activities are: viewing Niagara Falls and visiting friends/relatives travel occurs largely in summer and shoulder seasons U.S. Visitors Trip Purpose: see Niagara Falls 15% visit friends/relatives 24% attend special events 7% Activities: visit historic site 11% attend special event 11% specialized shopping 15% Ontario Residents visiting friends/relatives 52% camping 7% shopping 7%	U.S. Visitors hotel/motel 47% home of friend/relative 29% own cottage 10% Ontario Residents home of friend/relative 59% tent/tent trailer/travel trailer 11% hotel/motel 12%	U.S. Visitors mainly private car Ontario Residents automobile 88% bus 9%	U.S. Visitors 0 nights 59% 1 night 18% 2 nights 12% Ontario Residents 1 day 23% 2 days 21% 3 days 16%	U.S. Visitors Average party size 3.55 Age: 20-34 years 28% 35-44 years 50% Income: $10,000-$14,999 56% Ontario Residents Party size of 4 24% mainly families 46% Age: 20-34 years 43% for weekends 32% for vacations Education: high school 73% for weekends 68% for vacations Income: $10,000-$14,999 37% for weekends 43% for vacations	U.S. Visitors $138,812,000 sightseeing/touring/Niagara Falls 31% visiting friends/relatives 16% Ontario Residents $65,868,000 visiting friends/relatives 28% personal 18% sightseeing/touring/Niagara Falls 17% Other Provinces $23,804,000 sightseeing/touring/Niagara Falls 55% visiting friends/relatives 22%

represented equal proportions of the total visitation; the U.S. market group produced 61 percent of the total expenditures, the Ontario market group 29 percent, and other Canadians 10 percent.

In spite of the abundant resources with which the region is endowed, the tourism industry appears to be facing numerous difficulties. Visitation to the area currently exhibits a summer focus. Complaints voiced by visitors indicate that the quality of accommodation needs improvement and that the costs of accommodation are excessive, particularly in the Niagara Falls area. Since the support facilities and services on the united State's side of Niagara Falls are currently being upgraded and expanded, and the cost of accommodation is reputed to be lower; these complaints must be addressed immediately. Furthermore, in Niagara Falls, Canada, development centres around the Falls. The downtown area is not heavily promoted and subsequently benefits that could be realized by drawing travellers into this section of the city are lost.

A similar trend is evident on a regional basis. Visitation does not appear to penetrate beyond the Niagara Falls area into the zone's interior to any degree. This may be attributed, in part, to the fact that information about the surrounding countryside apparently is not available. Promotion might encourage the visitor to explore the zone and might contribute to the solution of another problem--the extremely short length of stay by the majority of visitors.

Finally, some of the appealing, but fragile features and areas in this zone could be threatened by insensitive development and overuse. Niagara-on-the-Lake, for example, is an extremely popular centre and excessive commercialization could destroy the very atmosphere that draws so many visitors.

Future Potential

Niagara-Brantford has immense potential for becoming a year-round destination area, not only for Ontario and U.S. market groups, but for other Canadians and the overseas markets as well. The zone contains Niagara Falls, an internationally famous natural feature and numerous other major attractions. It is highly accessible throughout the year and the majority of the existing support facilities and services are year-round in nature.

The continuing success of the tourism industry in this region appears to relate to four issues: preservation, integration, winterization, and increasing the length of stay and return visitation by ensuring user satisfaction. Fragile features and areas in the zone should be identified and impact analyses conducted in order that recommendations can be made regarding the balance required between preservation, development and use.

Activities that show promise for future tourism development are largely the same as those which currently interest visitors. These include viewing Niagara Falls and other natural features and landscapes, visiting man-made attractions, attending special events and conventions, specialized shopping, boating and some camping and cottaging. An attempt must be made to integrate the numerous resources in the zone in order to create a cohesive image and to make visitors aware of the desirability of visiting the interior. Integration can be achieved using any of the innumerable themes in Niagara-Brantford that lend themselves to the task (e.g., historical--military, political and native Indian; ethnic--Italian, Indian; agricultural--soft fruit production, market gardening, horticulture; industrial--steel and shipping; and, natural resource-based--shorelines).

Travellers should be encouraged to visit throughout the year and to remain longer in order to tour the whole zone. Niagara Falls, as the reception centre for such a great percentage of the zone's visitors and for a sizable transient traffic, is the appropriate gateway to Niagara-Brantford. As such, this centre should present a positive, friendly image, disseminate information about, and encourage travel into the remainder of the zone.

4. Kitchener-Stratford

This zone is characterized by numerous towns dispersed in a pleasant rural, agricultural landscape. These centres have become the focus of numerous attractions and festivals which are primarily based upon historical, cultural and ethnic themes. Kitchener/Waterloo, the largest urban concentration within the zone, is the setting for the major cluster of attractions and events and the only centre which is able to offer the diversity of eating-out, entertainment and shopping opportunities that comprise an urban experience. An inventory of existing development is provided in Table VI-9 and graphically illustrated by Figure VI-9.

Supportive development in the zone is year-round in nature. Kitchener/Waterloo, as the major service centre, supplies both direct and indirect tourism-related services. The other service centres, Guelph and Stratford, provide primarily the essential services required by visitors.

Access to the zone, by means of automobile, bus and rail, is excellent throughout the year. Air transportation is available, but the service is not scheduled.

An examination of current travel patterns (refer to Table VI-10) indicates that Ontario residents comprise, by far, the largest market group, representing almost 93 percent of the visitors. Americans account for 5 percent and other Canadians for 2 percent of the visitors. Visiting friends and relatives is the activity which draws the largest percentage of the Ontario market. The majority of these visitors tend to remain for more than 4 days and use the home of friends or relatives, hotel/motel and tent/trailer as accommodation. The length of stay for American travellers is considerably shorter as 50 percent stay 1 night or less. The forms of accommodation which they favour are outfitter/hostel/other, home of a friend or relative and hotel/motor hotel/motel in descending order of importance. The activities preferred by the U.S. visitor include visiting friends and relative, attending spectator sports and special events. Visitation to this region occurs year-round, but decreases considerably during the winter months.

Tourism-related expenditures in 1973 totalled $38,695,000. Seventy-five percent were attributed to the Ontario resident, 19 percent to the U.S. visitor and 6 percent to other Canadians.

DESTINATION ZONE MAPS

MASTER LEGEND

Transportation Facilities

401 Multi-lane Divided Highway
7 Major Two-lane Highway
503 Other Highway
Rail Passenger Service
Navigable Canal
International Airport
Interprovincial Airport
A Other Airport
International/Provincial Border Entry Point

Service Centres and Facilities

Provincial Centre
Sub-Provincial Centre
Regional Centre
Area Centre
Local Centre
National Park
Provincial Park
Major Beach
Major Attraction
Attraction Cluster
E Major Event
EEE Event Cluster

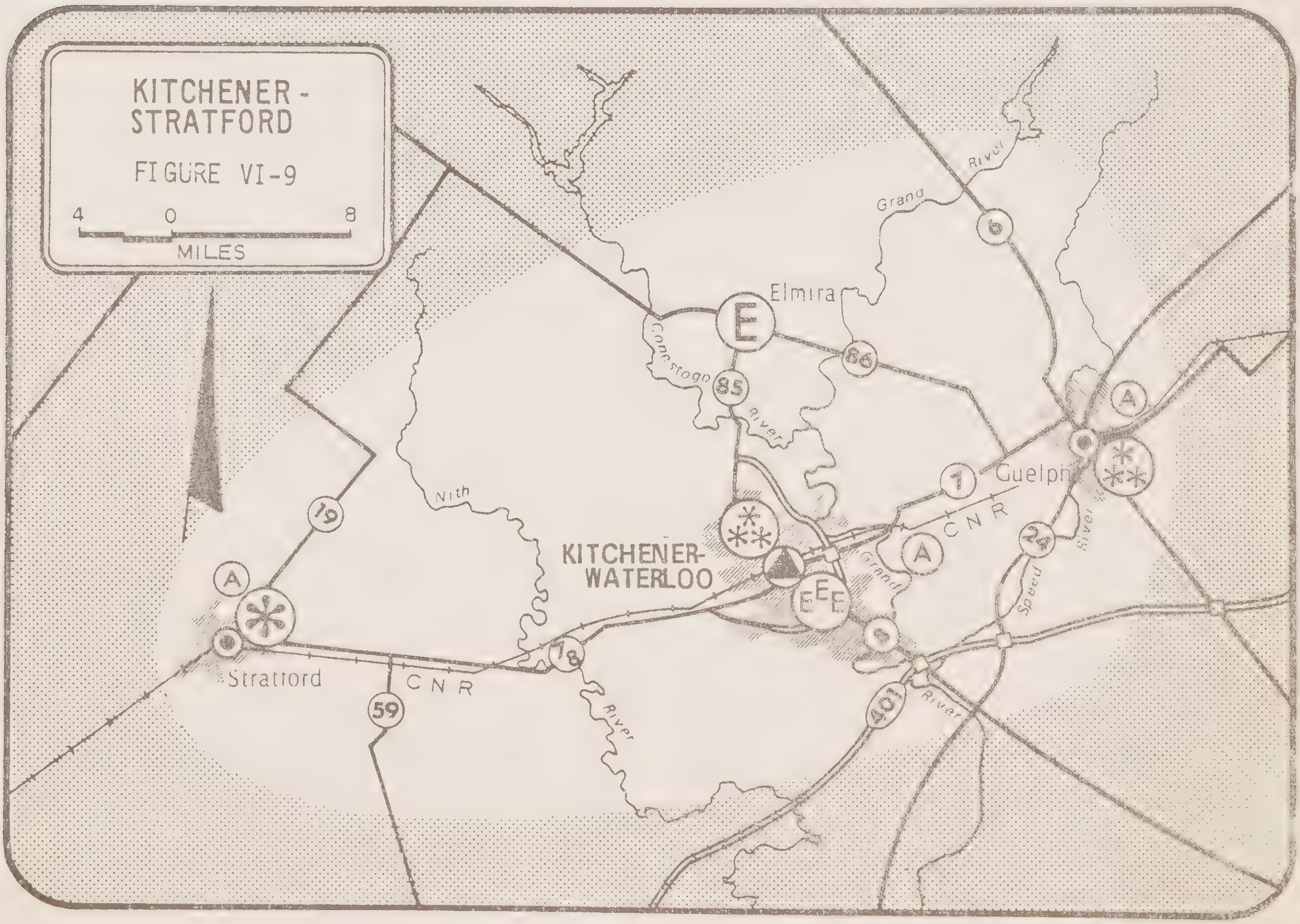


TABLE VI-9

ZONE SUPPLY INVENTORY - KITCHENER-STRATFORD

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. concentration of features ranking high for intensive recreation purposes around Elora, Rockwood, Elora Gorge (i.e., rock formation landscapes	. focal point for a majority of provincially significant attractions and events at Kitchener/Waterloo and Stratford . emphasis on a cultural/historical theme in this zone Cultural - based on Mennonite and Amish, German and Polish ethnic origins (i.e., Kitchener's Farmers Market, Oktoberfest, Elmira Sugar Festival, etc. . Stratford Festival is a major cultural attraction . historical attractions include Doon Pioneer Village and Woodside National Historic Park . pleasant rural farm landscape in remainder of the zone . other attractions are educational in nature (University of Waterloo, Sir Wilfrid Laurier, University of Guelph)	. Kitchener/Waterloo is termed a regional service centre. Local service centres include Guelph and Stratford . Kitchener/Waterloo - around 900 year-round accommodation units; limited number of private campsites - offers a range of dining/shopping/entertainment facilities . Stratford - approximately 550 year-round units . Guelph, Elora, Elmira, St. Jacobs offer essential services to visitors . Toronto serves as an external service centre	. this zone is located within the Niagara and Mid-Western Ontario and the Southwestern Ontario Travel Association area	. excellent year-round access via road (Highways 401, 8, 7 and 6), rail (C.N.R.) and air (local airport at Kitchener) . scheduled bus service to and from major centres . efficient internal transportation system . lacks adequate air service - no scheduled flights at airport	Population - approximately 369,000 Age Breakdown 0-14 years - approx. 17% 15-24 years - approx. 21% 25-54 years - approx. 44% greater than 54 years - approx. 18%

TABLE VI-10

CURRENT TOURIST MARKET PATTERNS IN THE KITCHENER - STRATFORD ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Approximately 93% of the visitors are Ontario residents, 5% from the U.S. and 2% from other provinces U.S. Visitors Michigan 50% New York 17% Ohio 16% Ontario Residents weekend trips: Central Ontario 45% Midwestern Ontario 18% Northeastern Ontario 32% Eastern Ontario 26%	Usage occurs year-round but decreases during winter months U.S. Visitors Trip Purpose: visit friends/relatives 31% other non-business 20% other business 14% Activities: attend spectator sports 41% attend special events 22% downhill skiing 15% Ontario Residents Activities: visit friends/relatives 68% for weekends 71% for vacations	U.S. Visitors outfitter/hostel/other 39% home of friend/relative 29% hotel/motor hotel/motel 24% Ontario Residents home of friend/relative 56% hotel/motel 19% tent/tent trailer 14%	Ontario Residents automobile 91% bus 7% rail 2%	U.S. Visitors 0 nights 29% 1 night 21% 4 or more nights 19% average number of nights in Ontario per party 3.57 Ontario Residents 1 week 39% 4-6 days 28% 2 weeks 17%	U.S. Visitors Average party size 2.39 Age: 45-64 years Income: $15,000-$24,999 32% Ontario Residents party size for vacation for 2 43% and 4 39% mainly families 54% Age: for weekends 20-34 years 41% for vacations 12-19 years 43% Education: high school 61% for weekends 63% for vacations Income: for weekends $10,000-$14,999 33% for vacations $6,000-$9,999 55%	U.S. Visitors $7,300,000 outdoor recreation/visiting own cottage resort 30% visit friends/relatives 23% special events 23% Ontario Residents $29,199,000 visit friends/relatives 30% personal 20% sightseeing/touring/Niagara Falls 19% Other Provinces $2,196,000 visit friends/relatives 53% other business 27%

Problems faced by the tourism industry in this zone relate to the short length of stay by visitors, the tremendous decrease in visitation during the winter, and the lack of tour packages within the zone. Complaints voiced by visitors indicate that accommodation prices in the area are considered excessive.

Future Potential

The combination of the 'small town atmosphere', rural landscape and ethnic flavour of the area can be expected to continue to appeal to the major markets. Total theme development to integrate these components would certainly benefit the zone. Among the development themes that exhibit potential in Kitchener-Stratford are ethnic and religious (e.g., German, Amish, Mennonite), historical (agricultural and agricultural communities) and present-day agricultural.

"Attraction possibilities include the staging of more ethnic events and interpretation and development of small rural villages in the pioneer spirit (e.g., Elora). Various functions at the three universities in the area should be more closely affiliated with community life and designed to attract visitors" (Gunn et al., 1975, p. 28). Creation of tour packages within the zone and encouraging winter visitation would also aid this zone in realizing greater benefits from tourism.

5. Toronto

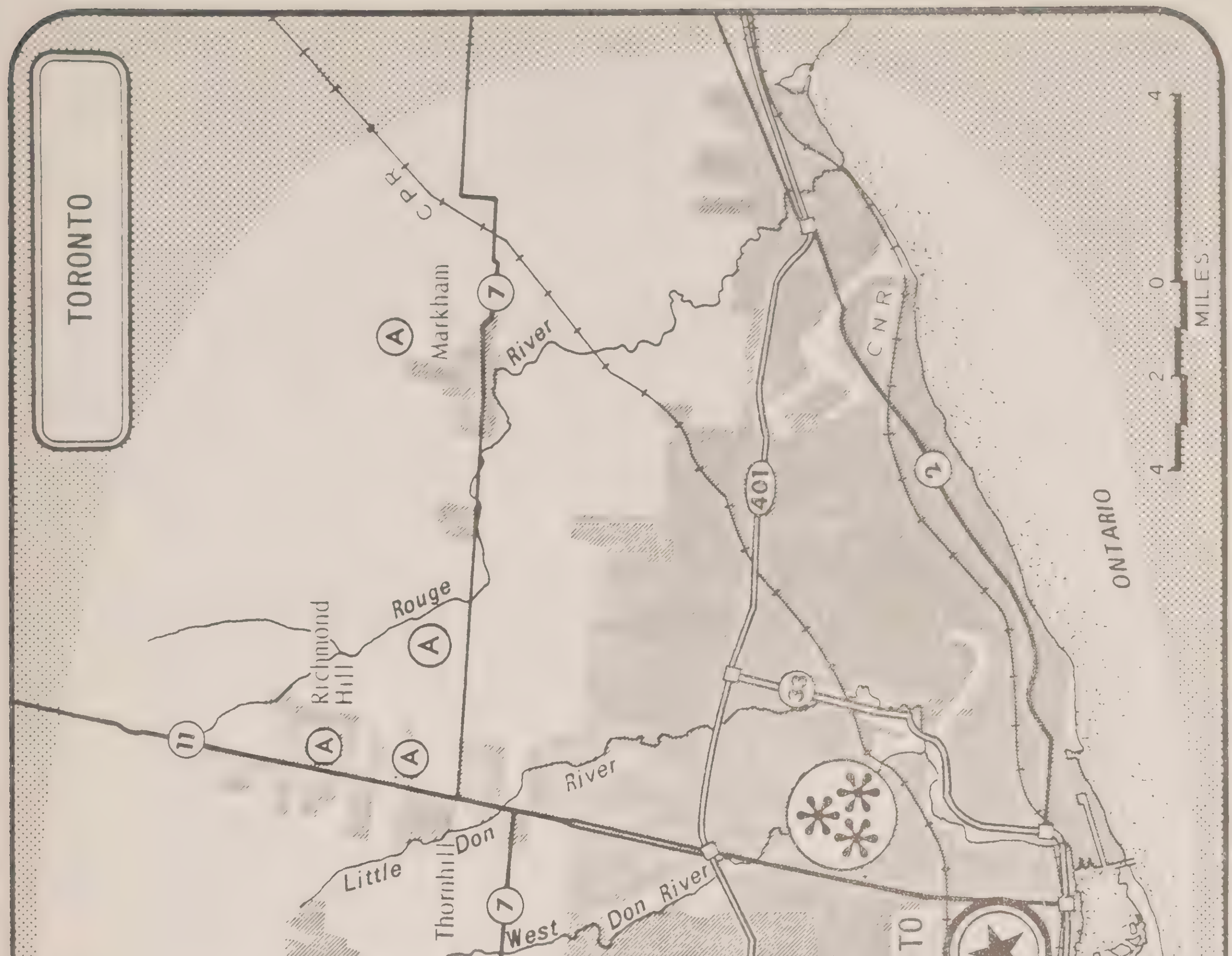
Toronto, as the province's most significant tourism-related service centre, has an exciting cosmopolitan atmosphere (refer to Table VI-11 and Figure VI-12). It has the image of being a safe, friendly city, but there is concern that, as the crime rate increases, it will lose this reputation.

This zone offers the tourist a most diversified environment in which to enjoy an innumerable supply of goods and services. The Lake Ontario shoreline and Toronto Islands provide pleasant settings for a number of major man-made attractions and events (e.g., Ontario Place, Mariposa Folk Festival). The downtown core offers a unique diversity of goods and services for shopping, eating-out, and entertainment that are all part of an urban experience. Toronto is considered the province's foremost convention city, but it is lacking a major convention centre. This zone not only provides the traveller with innumerable direct services, but it also serves the tourism industry throughout the province in a number of capacities (e.g., administration, wholesaling, distribution point for goods, services and visitors). Dissatisfaction with the tourism plant is related, for the most part, to accommodation. Both the quality and high prices are criticized.

Year-round access to Toronto by all modes of transportation is excellent. The internal transportation network is the most sophisticated in Ontario.

Total tourism receipts in the Toronto zone in 1973 were $376,335,000, the highest for any zone within the province. Although American residents represented only 14 percent of the total visitatio, they accounted for 48 percent of the expenditures (refer to Table VI-12). The majority of the U.S. visitors originated in the States of New York and Michigan. Visiting Ontario cities and towns and visiting friends and relatives were the main trip purposes. Activities in which Americans were interested inclued visiting historical sites, attending special events and shopping. Over 50 percent of these visitors stayed in the area less than 2 nights, using hotels/motels and the homes of friends and relatives as the preferred forms of accommodation.

Ontario residents were responsible for 76 percent of the total visitation and 43 percent of the 1973 tourism receipts, while other Canadians represented 10 percent of the visitation and 9 percent of the expenditures.



TORONTO
Markham
Richmond Hill
Rouge
River
Little
Don
River
Thornhill
Maple
Kleinberg
Woodbridge
Humber
River
West
Don River
Bramalea
Etobicoke
Creek
TORONTO
C N R
C P R
QLW
401
400
7
11
27
33
10
5
2
LAKE
ONTARIO
4 2 0 4
MILES

FIGURE VI-10

TABLE VI-11

ZONE SUPPLY INVENTORY - TORONTO

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. highly urbanized . however, sense of openness provided through incorporation of natural landscape into parks and open space system . waterfront area is currently under development (i.e., Harbourfront) - provides an excellent setting for some of Toronto's major attractions (i.e., Ontario Place) . Toronto Island Park offers recreational opportunities . conservation areas surrounding Metro provide opportunities for camping and recreational activity . Lake Ontario - water-based activities (i.e., sailing)	. concentrations of persons of following ethnic origins Ukrainian, Polish, Chinese, Italian, West Indian, etc. . outstanding concentrations of Provincially significant man-made attractions and events, both cultural/ethnic (i.e. Caravan, Caribana, O'Keefe Centre, Ontario Place, etc.) and historical (i.e., Black Creek Pioneer Village, Fort York, Ontario Legislative Buildings, Royal Ontario Museum, professional sports, facilities, etc.) . a major attraction, the McMichael Art Gallery, located at Kleinburg . these attractions and events have year-round appeal and potential . high concentrations of additional recreational and/or educational attractions and events	. Toronto is a provincially important service centre . highly developed and sophisticated services/facilities available . diverse and numerous accommodation, dining and entertainment opportunities . only city in Ontario with approximately 17,000 units of hotel and motel accommodation (with emphasis on major hotels) . has the support services and facilities required to be Ontario's major convention centre . shopping opportunities are unparalleled in diversity and quality (i.e., manufacturer's outlets top fashion boutiques, specialty stores, etc.) . excellent quality and variety of entertainment opportunities . provincial capital	. served by the Metropolitan Toronto Travel Association	. excellent year-round access . focal point of all major international, national and provincial routes; Roads: Highways 401, 400, 11, 27, etc. Rail: Canadian National, Canadian Pacific Air: Toronto International Airport Sea: Toronto Harbour Bus: to and from major centres; subway, streetcar and bus service within city	Population - approximately 2,500,000 Age Breakdown 0-14 years - approx. 25% 15-24 years - approx. 16% 25-54 years - approx. 42% greater than 54 years - approx. 17%

TABLE VI-12

CURRENT TOURIST MARKET PATTERNS IN THE TORONTO ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Main market group is the Ontario resident 76% 14% from the U.S. 10% from other provinces U.S. Visitors New York 50% Michigan 25% Ontario Residents Central Ontario 37% Niagara 13% and Eastern Ontario 11% for weekend trips Central Ontario 29% Northeastern Ontario 17% and Eastern Ontario 16% for vacations	Year-round visitation U.S. Visitors Trip Purpose: visit Ontario cities or towns visit friends/relatives other non-business Activities: visit historic sites attend special events specialized shopping 15% Ontario Residents Activities: visit friends/relatives 53% on vacations and 64% on weekend trips cottaging on vacations 23% and shopping on weekend trips 11% shopping on vacations 9% and attending events on weekend trips 5%	U.S. Visitors hotel/motor hotel/motel home of friends/relatives outfitter/hostel/other Ontario Resident home of friends/relatives 77% on weekend trips and 54% on vacations hotel/motel 16% on weekends cottage/chalet/hobby farm 22% on vacations	Ontario Residents automobile on weekends 79% on vacations 78% bus on weekends 12% on vacations 9% air on vacations 8%	U.S. Visitors 0 nights 27% 2 nights 25% 4 or more nights 19% Ontario Residents on weekend trips 2 days 40% 1 day 39% 3 days 14% on vacations 4-6 days 43% 1 week 34%	U.S. Visitors Average party size is 2.6 persons Age: 20-34 years 33% Income; $15,000-$24,999 31% Ontario Residents Party size 2 persons for weekends 36% on vacations 30% mainly families 27% and couples 27% for weekend trips single persons 27% families 26% and couples 25% for vacations Age: 20-34 years 35% on weekends 12-19 years 31% on vacations Education: mainly high school 61% on weekends 60% on vacations Income: $10,000-$14,999 on weekends 31% $6,000-$9,999 on vacations 23%	U.S. Visitors $161,095,000 visit Ontario cities and towns 23% visit friends/relatives 22% other business 12% Ontario Residents $181,522,000 visit friends/relatives 27% personal 18% other business 17% Other Provinces $33,718,000 visit friends/relatives 51% sightseeing/touring/Niagara Falls 28%

Activities in which many of the Ontario residents participated included visiting friends and relatives and shopping. They tended to remain for longer periods of time than the Americans, staying, for the most part, in the homes of friends or relatives or in hotels/motels.

Visitation by all market groups occurs on a year-round basis, but summer use is somewhat heavier than that during the winter season.

Future Potential

Toronto will remain an internationally famous urban destination area and a major distribution point for incoming visitors. Creation of additional air links with distant markets and better packaging of fly-drive services could help to increase visitation. Activities that lure thousands of visitors are expected to continue to centre around large-scale attractions and events, the urban experience, business and convention opportunities.

Possibilities for further capitalizing on these opportunities lie in the thematic integration of the tourism components, the construction of a convention centre and increasing the winter visitation. Themes with with potential for development find their bases in the urban experience, the historical, the ethnic population concentrations, the industrial and interesting features such as the waterfront. The potential for increasing winter visitation can be tapped, to some degree, by extending the season during which attractions such as Ontario Place are in operation and the creation of more winter and shoulder season events.

6. Bruce Peninsula

The peninsular form of this zone provides unity, as well as a discrete identity (refer to Figure VI-11). Water and the natural environment, in particular shoreline features, and the Niagara Escarpment comprise the prime resources in this zone (refer to Table VI-13). The tourism industry has capitalized on these features, leaving the interior of the zone relatively undeveloped from a tourism perspective.

The following description, based on intensive study of this region, summarizes the existing state of development:

> Present development on the Bruce is in transition. Although cottage development has taken place, no major complexes of innovative design or special adaptation to the resources have emerged. Although business is responding to the growing demand for services, there is little evidence of planning major complexes at strategic locations. Instead, the traditional strip of low-quality commercialization seems to be developing. Some innovative interpretive programs, such as a commercial boat trip to Flower Pot Island, exist but generally the visitor is left to his own devices to find points of interest and to understand them. Several nucleii of tourism-recreation-park service centers can be found but none seems to be planned and developed, for the best interests of business or for the most efficient use of land. (Gunn et al., 1975, p. 42)

Tourism-related facilities and services currently provided in centres other than Owen Sound are highly seasonal. Access, too, is seasonal. In the summer, visitors can easily enter the zone by automobile, bus, ferry or boat. In addition, a number of small airports offer services on a non-scheduled basis. Winter access is difficult; climatic conditions hinder automobile travel and daily scheduled bus service is available only to Owen Sound.

Most of the difficulties of the tourism industry in this zone relate to the inadequacy of existing development; the lack of accommodation, especially resorts, of gift shops, eating-out and entertainment opportunities, and of man-made attractions and tours is an obvious shortcoming. The need for planning and integrating existing and future development is also evident.

The Ontario market group accounts for 96 percent of the visitation to the Bruce Peninsula, the U.S. group for 3 percent and other Canadians for the remaining 1 percent. Major activities in which all market groups

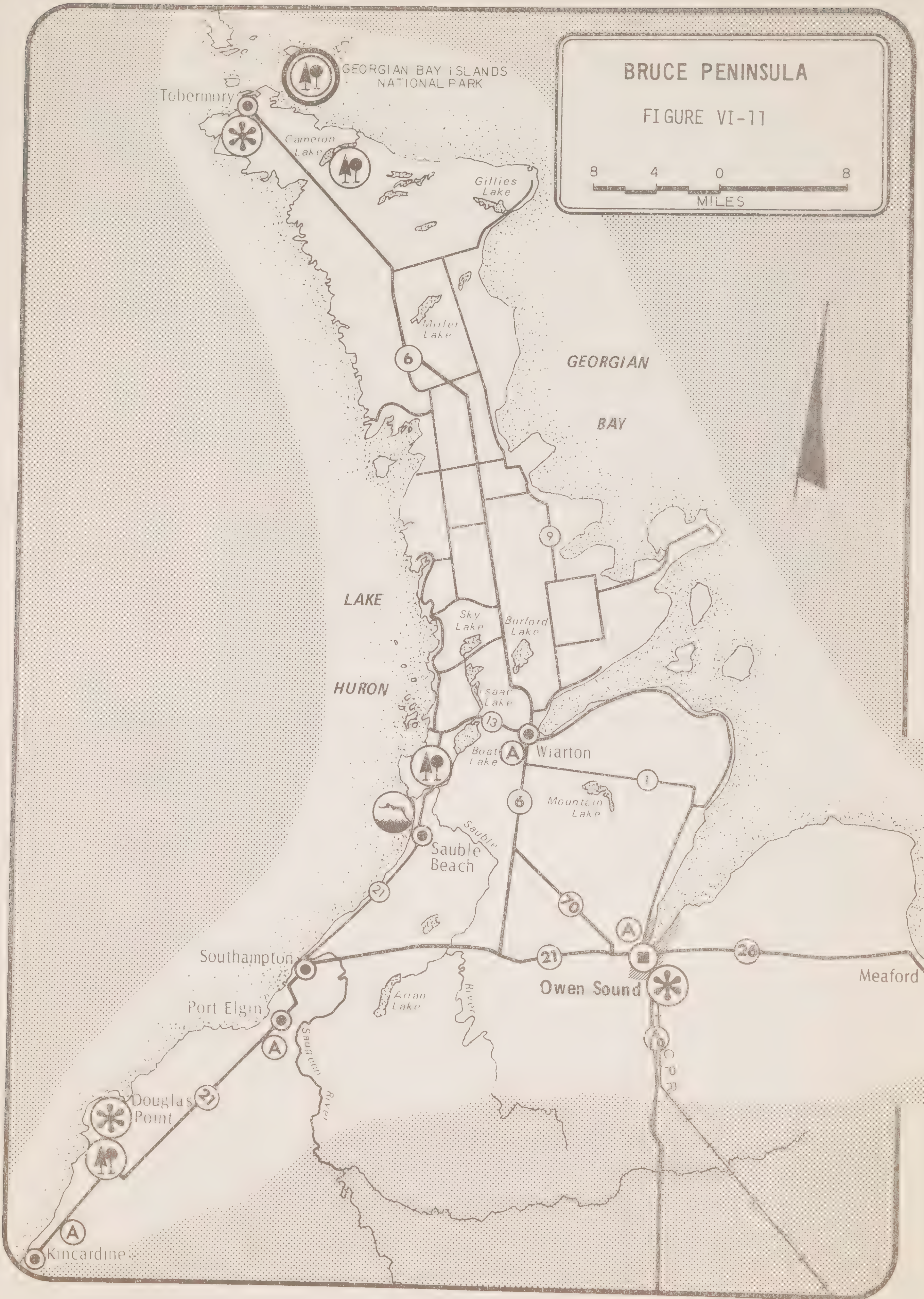

BRUCE PENINSULA
FIGURE VI-11
8 4 0 8
MILES
GEORGIAN BAY ISLANDS
NATIONAL PARK
Tobermory
Cameron Lake
Gillies Lake
Miller Lake
GEORGIAN
BAY
LAKE
HURON
Sky Lake
Burford Lake
Isaac Lake
Boat Lake
Wiarton
Mountain Lake
Sauble
Sauble Beach
Southampton
Owen Sound
Meaford
Port Elgin
Arran Lake
River
Saugeen
River
Douglas Point
Kincardine
C.P.R.

TABLE VI-13

ZONE SUPPLY INVENTORY - BRUCE PENINSULA

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. major attractions are based on natural features -contains areas with high ranked features, capable of intensive use -Sauble Beach to Kincardine - sand beaches for swimming, boating, cottaging -Sauble Falls - scenic viewing -Sauble River-angling -Owen Sound to Lion's Head-boating, swimming, cottaging, etc. -Niagara Escarpment & exceptionally scenic coastline - hiking, viewing, etc. -Tip of Peninsula - rock formations, underwater exploration, boating, etc. -Georgian Bay Islands National Park -pleasant rural landscape in remainder of peninsula . prime natural resource of area is water . noted for variety of plant and bird species . no restrictions to development but must proceed with caution along escarpment . majority of recreational opportunities associated with the natural features in the zone	. historical attraction at Owen Sound (Tom Thompson Memorial Art Gallery) and shipwreck history of the Bruce Peninsula (focused at Fathom Five Provincial Park . some recreational attractions (i.e., Manitoulin Island Car Ferry, Bruce Nuclear Power Development . Bruce Trail	. Owen Sound is an area service centre - approximately 400 year round hotel/motel units -has major marina facility -widest diversity of dining/shopping/entertainment facilities in zone . Wiarton, Tobermory, Sauble Beach, Southampton, Port Elgin, Kincardine are local service centres - offer mainly seasonal accommodation, marinas and essential services . 4 Provincial parks with campgrounds . Toronto serves as external service centre	. is situated in the Georgian Bay Travel Association area	. access by road (Highways 26, 21 and 6) and water (along entire shoreline, best in Georgian Bay) . winter access less adequate . 19 individual marinas along coastline from Kincardine to Owen Sound . daily scheduled bus service and ferry service to Manitoulin in summer . airports at Wiarton, Owen Sound, Port Elgin and Kincardine - non-scheduled flights . good scheduled bus service to Owen Sound	Population approximately 102,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 19% 25-54 years - approx. 32% greater than 54 years approx. 23%

participate (i.e., cottaging, camping, fishing, boating, swimming) occur primarily during the summer and 'shoulder' seasons. Visiting friends and relatives, however, is also a main activity and can occur year-round. Both Ontario and American visitors regard cottages and the homes of friends or relatives as the most preferred forms of accommodation. Table VI-14 describes these and additional current market travel patterns in greater detail.

The total tourist expenditures in the Bruce Peninsula in 1973 were $15,276,000. Ontario residents accounted for 88 percent of the revenue, American visitors for 10 percent and residents of other provinces for 2 percent.

Future Potential

The future potential of the tourism industry in the Bruce Peninsula zone lies in the expansion of development to support activities which are currently popular and are expected to continue to appeal to the markets: boating, outdoor recreation, cottaging and camping. Special attention should be focused on the abundant water resources, shoreline features (beaches) and the Niagara escarpment.

Development needs include accommodation, dining, shopping and entertainment facilities, large-scale marinas, man-made attractions, interpretive programs, tours and better public transportation services. The construction of the proposed Fathom Five Provincial Park, an underwater attraction, promises to give impetus to such development.

It will be essential, however, to maintain the "natural environment" theme of this zone, even during expanded development. The expansion must be well planned and designed in order to serve both the interests of resource protection and tourism development.

The industrial and cultural base of this zone could allow for much more development (e.g., the development centred around the Douglas Point Nuclear plant could be expanded). "The timber era, the fishing era and the important role of the harbours in early commerce could be developed as points of interest" (Gunn et al., 1975, p. 43).

Winter season opportunities can be created by providing the infrastructure to support activities such as snowmobiling, cross-country skiing and year-round resort vacations. Winter use of second residences within the zone is expected to increase within the next few years.

TABLE VI-14

CURRENT TOURIST MARKET PATTERNS IN THE BRUCE PENINSULA ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Majority of visitor market is from Ontario 96% 3% are from the U.S. and 1% is from other provinces U.S. Visitors Michigan few from other states Ontario Residents Central Ontario 37%, Niagara 21% and Midwestern Ontario 20% for weekend trips Central Ontario 32%, Niagara 17% and Midwestern Ontario 17% for vacations	Major activities occur mainly during summer and shoulder seasons visiting friends/ relatives can occur year-round U.S. Visitors Trip Purpose: stay at cottage/ cabin visit friends/ relatives outdoor recreation activities Activities: Swimming Fishing Motor boating Ontario Residents Activities: visit friends/ relatives 24% cottaging 22% fishing and camping each 11 %	U.S. Visitors own cottage home of friends/ relatives hotel/motor hotel/ motel 7% Ontario Residents cottage/chalet/ hobby farm 48% home of friends/ relatives 18% tent/tent trailer 16%	Ontario Residents automobile 95% bus 3%	U.S. Visitors 4 or more nights 3 nights 1 night Ontario Residents 1 week 39% 4-6 days 28% 2 weeks 25%	U.S. Visitors Age: 20-34 Income: $15,000-$24,999 Average party size 5.39 Ontario Residents Party size of 4 23% 56% were families Age: for weekends 20-34 years 29% for vacations 12-19 32% Education: majority have high school 68% on weekend and 70% on vacations Income: $10,000-$14,999 39% on weekends and 41% on vacations	U.S. Visitors $1,476,000 outdoor recreation own cottage/resort 68% Ontario Residents $13,542,000 visit friends/ relatives 31% sightseeing/ touring/Niagara Falls 24% personal 19% Other Provinces $258,000 visit friends/ relatives 67%

7. Collingwood-Midland-Orillia

This zone supports a great variety of intensive and extensive outdoor recreation activities in all seasons. Table VI-15 relates a detailed account of existing development and Figure VI-12 provides a graphical description. The water/beach-oriented activities, popular summer attractions along the Georgian Bay and Lake Simcoe shorelines and the Trent/Severn System, are complemented by winter opportunities which are most intensively developed in the Collingwood area.

Historical development on the Midland Peninsula centres around the Huron Indian, the Jesuit Missionaries, and, to a lesser degree, the naval history of the upper Great Lakes. Relatively little tourism development is situated in the interior of the zone, although scenic rural and natural landscapes exist in this area.

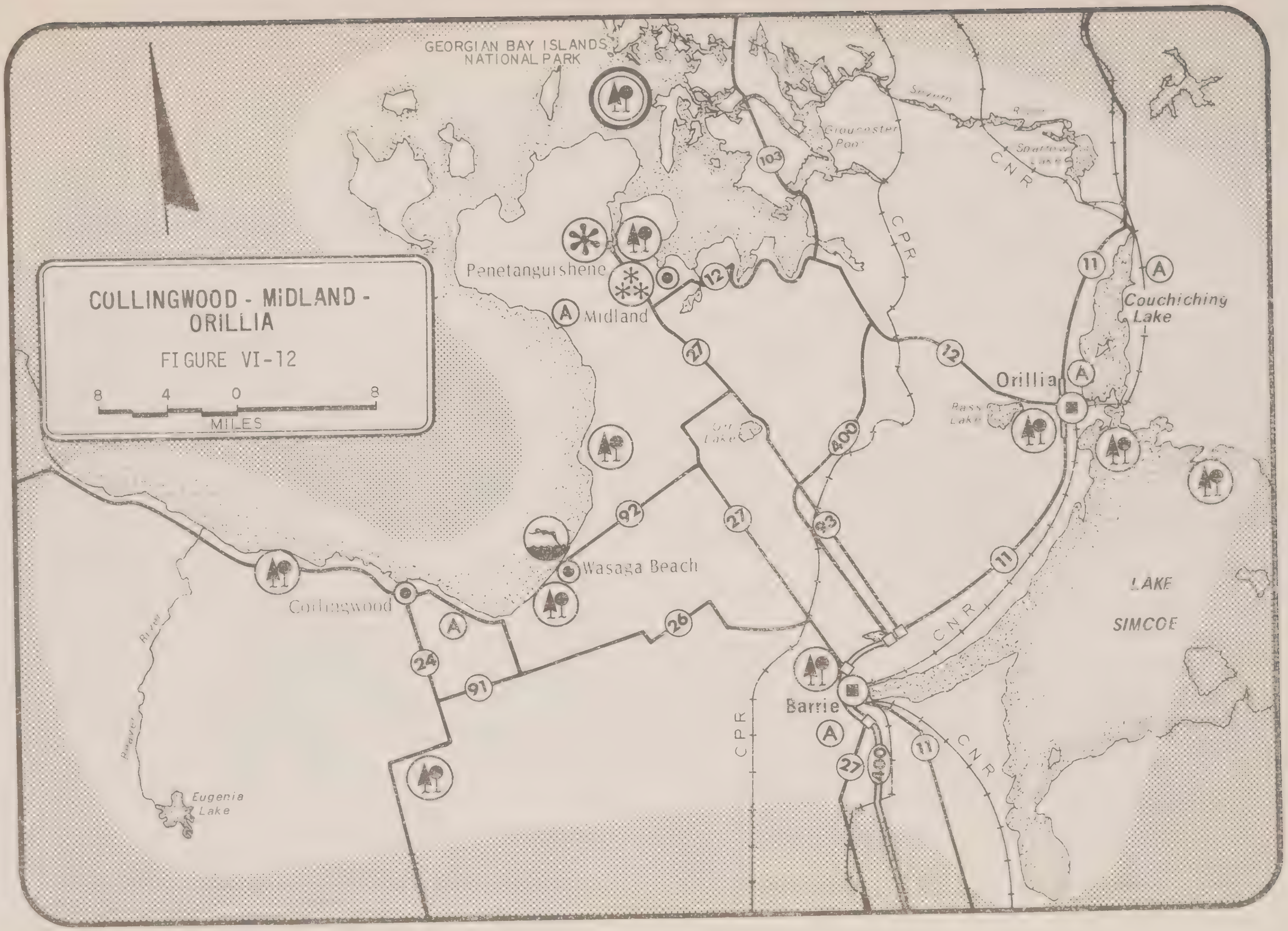
Year-round support facilities and services have been developed in Barrie, Orillia and, to a lesser degree, in Collingwood and Midland. In the remainder of the zone, the supportive development is highly seasonal exhibiting a definite summer orientation. The quality of all services, needs to be improved and additional accommodation in some areas is required.

Access by automobile, bus, boat and air transportation to all segments of the zone is excellent.

Current market travel patterns are illustrated on Table VI-16. The majority of visitors are Ontario residents (92%) originating largely from Central Ontario. Those who make weekend trips engage in visiting friends and relatives, cottaging and motor boating. Vacationers are interested in cottaging, visiting friends and relatives and camping. In the winter many people make short-term visits to ski.

Three percent of the visitors originate in the U.S. and vacation at resorts or cottages, visit friends and relatives and participate in outdoor recreation activities (e.g., swimming, motor boating, fishing). U.S. travellers tend to stay at the homes of friends or relatives, resort lodges and hotels/motor hotels/motels, while the Ontario visitor prefers cottages/chalets/hobby farms and the homes of friends and relatives.

Total tourism receipts in this zone were $38,768,000 in 1973. The Ontario resident contributed 78 percent of the total, the American visitor 14 percent and the other Canadian visitors 8 percent.



COLLINGWOOD - MIDLAND - ORILLIA

FIGURE VI-12

TABLE VI-15

ZONE SUPPLY INVENTORY - COLLINGWOOD-MIDLAND-ORILLIA

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. cluster of natural resource based attractions (i.e., Wasaga Beach, Blue Mountain, Honey Harbour, etc.) . natural appeal of this zone is its drawing power . exhibits outstanding potential for intensive recreation uses, due to a broad variety of high ranking features (i.e., Wasaga Beach, Blue Mountain, Notawasaga Bay, . high potential for supporting extensive recreational activity (i.e., hiking, driving, cross-country skiing, etc.	. heavy concentrations of major historical attractions around Midland and Penetanguishene (i.e., Ste. Marie Among the Hurons, Huron Indian Village, Martyr's Shrine, etc. . historical landscape with high potential for year-round tourism visitation . the Blue Mountain Pottery Works near Collingwood provides viewing as well as educational opportunities as does Summer School of Music . Bruce Trail	. Orillia and Barrie serve as area service centres. Local centres include Collingwood, Wasaga Beach, Midland and Penetanguishene . Barrie: highest quality and diversity of services in zone -approximately 500 hotel/motel units -approximately 525 private campsites . Orillia: around 650 hotel/motel units -approximately 600 private campsites -some diversity in dining/entertainment/shopping facilities	. served by the Georgian Bay Travel Association . travel information centre at Barrie	. good access by major highway routes (400 north, 27, 24) . scheduled bus service to outside centres . good access by boat (several major marinas) . winter accessibility constrained due to climatic conditions . internal road network well developed . increasing public transportation internally (if feasible) would improve internal traffic circulation	Population - approximately 176,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 20% 25-54 years - approx. 34% greater than 54 years - approx. 20%
. contains some of the most exciting scenery along Niagara Escarpment		. Wasaga Beach-approximately 800 hotel/motel/resort units - largely seasonal -around 800 private campsites at Wasaga Beach . 3 Provincial Parks with campsites . Toronto serves as an external service centre			

TABLE VI-16

CURRENT TOURIST MARKET PATTERNS IN THE COLLINGWOOD - MIDLAND - ORILLIA ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Majority of the visitor market comes from Ontario 92% 3% come from the U.S. and 4% from other provinces U.S. Visitors New York Michigan Ontario Residents majority from Central Ontario 76% for weekends and 67% for vacations	Major activities occur during the summer and shoulder seasons visiting friends and relatives can occur year-round U.S. Visitors Trip Purpose: vacation at resort/cottage visit friends/relatives outdoor recreation activities Activities: Swimming Motor boating Fishing Ontario Residents Activities: weekend trips visiting friends/relatives 27% cottaging 25% motor boating 10% vacations cottaging 25% visiting friends/relatives 18% camping 10%	U.S. Visitor home of friend/relative resort lodge hotel/motor hotel Ontario Resident cottage/chalet/hobby farm 54% on weekend trip and 43% on vacation home of friend/relative 18% on weekends other 17% on vacations	Ontario Resident automobile 94% on weekend trips and 91% on vacations bus 3% on weekend trips other 4% on vacations	U. S. Visitor 4 or more nights 0 nights 19% 3 nights Ontario Residents 4-6 days 35% 3 days 32% 1 week 21%	U.S. Visitors Average party size 2.67 persons Age: 45-64 years Income: $15,000-$24,999 Ontario Residents Party size of 2 31% for weekend trips 33% for vacations mainly families 37% for weekend trips 29% for vacations Age: 20-34 years 36% for weekend trips 34% for vacations Education: mainly high school 66% for weekend trips 61% for vacations Income: $10,000-$14,999 37% for weekend trips 37% for vacations	U.S. Visitor $5,291,000 outdoor recreation/cottage/resort 68% visit friends/relatives 17% Ontario Residents $30,232,000 visit friends/relatives 33% sightseeing/touring/Niagara Falls 21% personal 21% Other Provinces $3,245,000 sightseeing/touring/Niagara Falls 55% visit friends/relatives 26%

Future Potential

This zone will remain an outdoor recreation area, characterized by year-round development and short-term visitation. A mix of recreation opportunities focusing on the natural resource base, historical, agricultural (fruit farming) and industrial themes are expected to be the major attractions.

The historic sites and fruit farming industry are presently underdeveloped. They exhibit a particular suitability for interpretation. This type of development may increase the area's appeal to the American market. Other possible development that could benefit the tourism industry include package tours, activities and events suitable for the 'shoulder' and winter periods and the increase and improvement of service facilities in Barrie, Orillia, Midland, Wasaga and Collingwood.

8. Parry Sound-Huntsville-Barrie

This zone is characterized by a rugged landscape with a great variety of water features, including Georgian Bay, Lake Simcoe, the larger Muskoka Lakes, the Severn River and numerous smaller lakes. The landscape has the potential to support both intensive and extensive outdoor recreation opportunities, particularly water-oriented activities.

Existing development (refer to Figure VI-13) is concentrated along the varied shorelines of the lakes. The rocky, island-studded Georgian Bay coastline remains relatively undeveloped, except in the Parry Sound and Honey Harbour areas. Relatively large-scale resorts, second residences and campgrounds are major attractions in this zone.

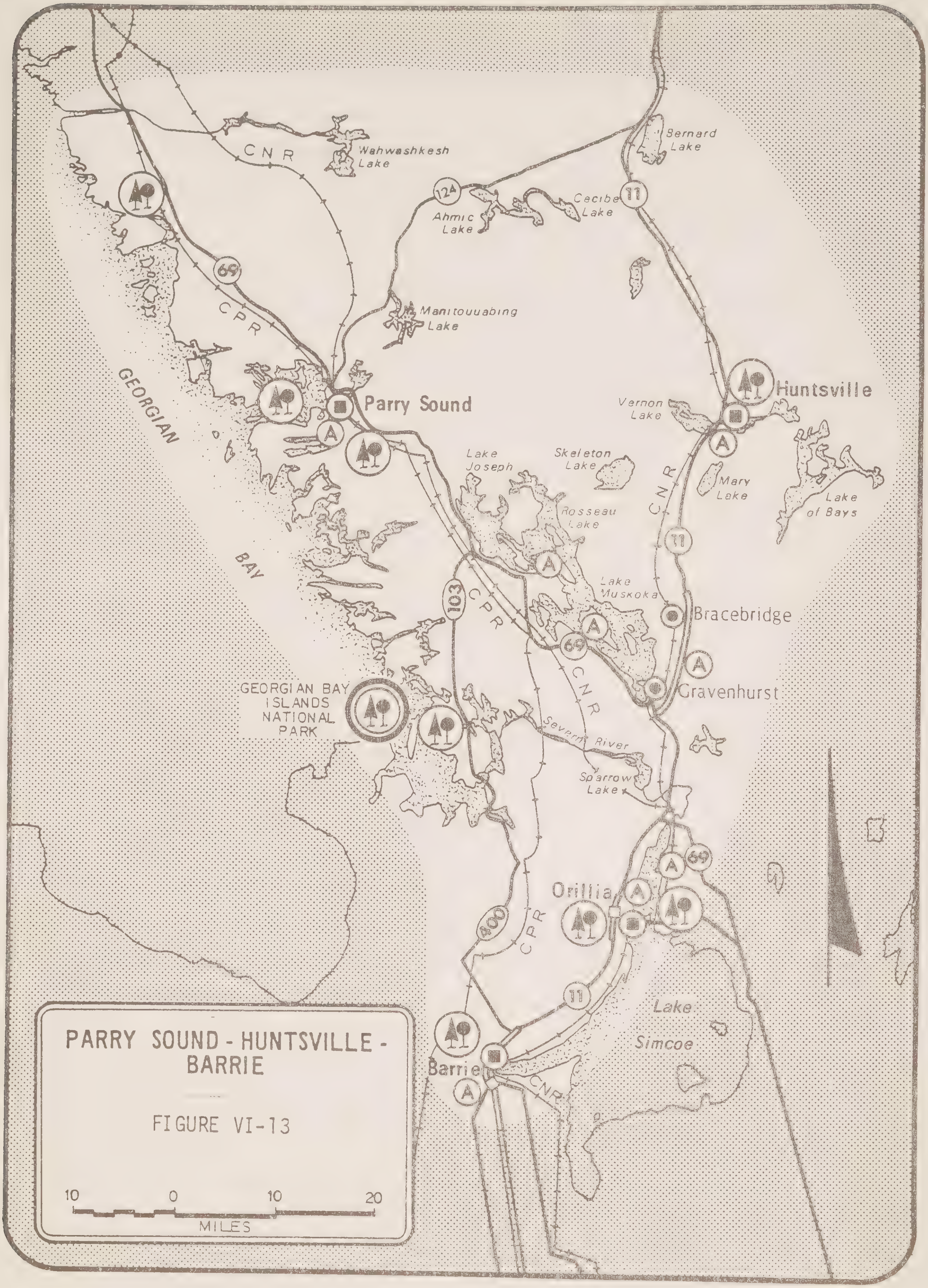
Table VI-17 presents a supply inventory of the zone, indicating that support facilities and services are mainly summer-oriented throughout most of the region. Only in the larger service centres, Barrie and Orillia, does supportive development demonstrate a year-round character.

This zone is accessible throughout the year by automobile, bus, rail and air, or by boat during the summer months.

Parry Sound-Huntsville-Barrie receives 90 percent of its visitation from Ontario, 6 percent from other Canadian provinces and 4 percent from the United States (largely from Ohio and New York). All market groups show an interest in activities that occur mainly during the summer and 'shoulder' seasons. The Ontario residents engage in cottaging, motor boating and fishing; whereas, U.S. visitors travel to this area to stay at cottages or cabins and to pursue water-oriented outdoor recreation activities such as those previously mentioned. (See Table VI-18).

The Americans tend to remain a week or longer using their own cottages, rented cabins/cottages, or the homes of friends or relatives as accommodation. The length of stay for Ontario visitors appears to be at least one week. Preferred forms of accommodation for this market group include cottage/chalet/hobby farm, tents/tent trailers and the homes of friends or relatives.

The 1973 tourist expenditures in this zone totalled $96,241,000. Seventy percent was contributed by Ontario residents, 23 percent by U.S. visitors, and 7 percent by other Canadians.



PARRY SOUND - HUNTSVILLE - BARRIE
FIGURE VI-13
10 0 10 20
MILES
Parry Sound
Huntsville
Bracebridge
Gravenhurst
Orillia
Barrie
GEORGIAN BAY ISLANDS NATIONAL PARK
GEORGIAN
BAY
CNR
CPR
Wahwashkesh Lake
Bernard Lake
Cecebe Lake
Ahmic Lake
Manitouuabing Lake
Vernon Lake
Lake Joseph
Skeleton Lake
Mary Lake
Lake of Bays
Rosseau Lake
Lake Muskoka
Severn River
Sparrow Lake
Lake Simcoe
124
11
69
103
400

TABLE VI-17

ZONE SUPPLY INVENTORY - PARRY SOUND-HUNTSVILLE-BARRIE

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. natural features provide the main basis for most attractions in this zone . concentration of high capability features for intensive recreation use - Muskoka Lakes (swimming, camping, cottaging, boating, angling), Georgian Bay Shoreline, plus islands - includes Georgian Bay Islands National Park . Canadian Shield - natural landscape, high potential for extensive recreational activity . current development based primarily on natural features - highly seasonal . some fall and winter attractions and events, i.e., Muskoka Calvalcade of Colours and Winter Carnival, skiing around Huntsville, etc. . future potential for similar development plus extension of season . shoreline development should be undertaken with caution	. historical attraction of regional significance at Orillia (Stephen Leacock Home) . Santa's Village - a recreational attraction at Bracebridge	. Barrie, Orillia and Parry Sound serve as area service centres. . Local centres include Gravenhurst, Bracebridge and Huntsville . Barrie: highest quality and diversity of services in zone -approximately 500 hotel/motel units -approximately 525 private campsites . Orillia: approximately 650 hotel/motel units -approximately 600 private campsites -some diversity in dining/entertainment/shopping opportunities . Parry Sound: Major harbour - approximately 925 hotel/motel/resort units; mostly seasonal - limited shopping/dining/entertainment . Huntsville, Gravenhurst: approximately 1250 motel/hotel/resort units Bracebridge: 404 units;mostly seasonal . Huntsville, Gravenhurst, Bracebridge provide around 1,500 campsites . six provincial parks with campsites . Toronto serves as an external service centre	. served by the Georgian Lakelands Travel Association and the Rainbow Country Travel Association . travel information centre at Barrie	. excellent road access via Highways 400, 69 and 11 and rail (C.N.R., C.P.R.) . boat access through Trent/Severn System and along Georgian Bay . daily scheduled bus service to and within zone . numerous small airports with non-scheduled services scattered throughout the zone . efficient internal road access	Population - approximately 116,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 20% 25-54 years - approx. 35% greater than 54 years - approx. 19%

TABLE VI-18

CURRENT TOURIST MARKET PATTERNS IN THE PARRY SOUND-HUNTSVILLE-BARRIE ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Ontario Residents 90% constitute main visitation market U.S. Residents form 4% and other provinces 6% of visitation market U.S. Visitors Ohio 28.2% New York 24.8% Ontario Residents Central Ontario 83% for weekend trips and 75% for vacations Niagara 6% for weekend trips and 10% for vacations	All major activities occur mainly during the summer and shoulder seasons U.S. Visitors Trip Purpose: stay at cottage, cabin 38.3% outdoor recreational activities 28.2% vacation at an Ontario resort 21% Activities: fishing 36% swimming 15.8% motor boating 7.2% Ontario Residents Activities: cottaging 40% motor boating 15% fishing 13%	U.S. Visitors own cottage 39.7% rented cabins/ cottage 21% home of friends/ relatives 15% Ontario Residents cottage/chalet/ 70% tent/tent trailer 13% home of friend/ relative 6%	Ontario Residents automobile 90% boat 5% other 3%	U.S. Visitors 4 or more nights 74.4% 3 nights 16.1% 2 nights 5.9% Ontario Residents 1 week 36% 4-6 days 22% 2 weeks 21%	U.S. Visitors average party size 6.3 persons Age: 45-64 years 26.9% Income: $15,000-24,999 29.3% Ontario Residents party size of 2 22% mainly families 64% Age: 20-34 years 31% for weekend trips 35-49 years 29% for vacations Education: highschool 69% for weekends and 60% for vacations Income: $10,000-14,999 39% for weekends and vacations	U.S. Visitors $21,923,000 outdoor recreation/ visiting cottage/ resort 68% visiting friends/ relatives 17% other business 6% Ontario Residents $67,090,000 visiting friends/relatives 32% sightseeing/touring/Niagara Falls 24% personal 20% Other Provinces $7,228,000 visiting friends/relatives 51% sightseeing/touring/Niagara Falls 28%

Indications are that a number of additions and improvements to the existing tourism plant would benefit the industry. These include more and improved accommodation and eating-out facilities, resorts that operate throughout the year, the development and maintenance of groomed cross-country ski trails and packaged tours into the area. Visitors also communicated some discontent with, what they considered to be, excessive charges for accommodation.

Future Potential

This zone is expected to develop into a year-round resort area. Unlike a number of other resort areas, it will likely be characterized by large-scale development focusing on activities similar to those which currently attract visitation (i.e., resort vacations, cottaging, boating, other nature-based and facility-oriented recreation opportunities, and non-urban conventions). Integrative themes, with high potential for development, centre around the natural resource base (aesthetic shorelines, lakes, canals and natural landscapes, 'accessible' wilderness) and historic resources (native Indians, agriculture and agricultural communities).

It appears likely that Ontario residents will continue to be the largest market group and is also the market group that is expected to take the most advantage of winter opportunities. Many Ontario residents are already utilizing their second residences during the 'shoulder' and winter seasons and more are expected to do so in the next few years. The development of specialty resorts, 'more' and 'better' accommodation and eating-out facilities, tour packages and additional recreation opportunities will probably also increase the zone's appeal to other market groups.

It is extremely important, when considering future expansion of the tourism plant, to keep in mind that the natural environment is the key attraction. Consequently, the balance between development, use and environmental quality must be maintained, at all costs, to ensure the zone's future viability.

9. Peterborough-Haliburton

In this resort region, tourism development is centred largely in the southern sector along the shorelines of Rice Lake, the Trent Canal and the Kawartha Lakes. The northern half of the region is far less intensively developed. Activities around which tourism development has occurred find their basis mainly in the natural environment. The natural resource base demonstrates a high capability for supporting cottaging, camping, boating, angling and swimming, in addition to a number of extensive recreation opportunities. Some historical development has taken place in the Peterborough area. Although the character of the support facilities and services in the norther portion of the zone is highly summer-oriented, there is considerable year-round development in the Kawartha Lakes area. Table VI-19 and Figure VI-14 respectively provide verbal and graphical inventories of existing development.

Access to the zone is good throughout the summer months but deteriorates in winter due to climatic conditions. Winter travel is especially limited in the northern section of the zone.

Most problems in the area relate to an inadequate supply of good accommodation, especially resorts and other support facilities and services; both quality and quantity are lacking. 'More' and 'better' trails are required for cross-country skiing and snowmobiling. Finally, excessive weed growth in the Kawartha Lakes area has resulted in a decrease of swimming and boating activity, and if left unchecked can ultimately threaten the tourism industry.

Ontario residents comprise the largest visiting market, representing 94 percent of the total visitation; American visitors, originating mainly from Ohio, New York and Michigan, comprise 4 percent; and, other Canadians represent the remaining 2 percent. Activities which attract Ontario residents include recreational driving and touring, cottaging and motor boating. U.S. market information indicates that trip purposes evolve largely around vacation at Ontario resorts, outdoor recreational activities (e.g., fishing, motor boating and swimming) and staying at cottages/cabins.

Table VI-20 indicates that most American visitors remain in the area for at least one night, with the majority (76%) staying 4 or more nights. Resort lodges, own cottages and rented cabins/cottages are the accommodation

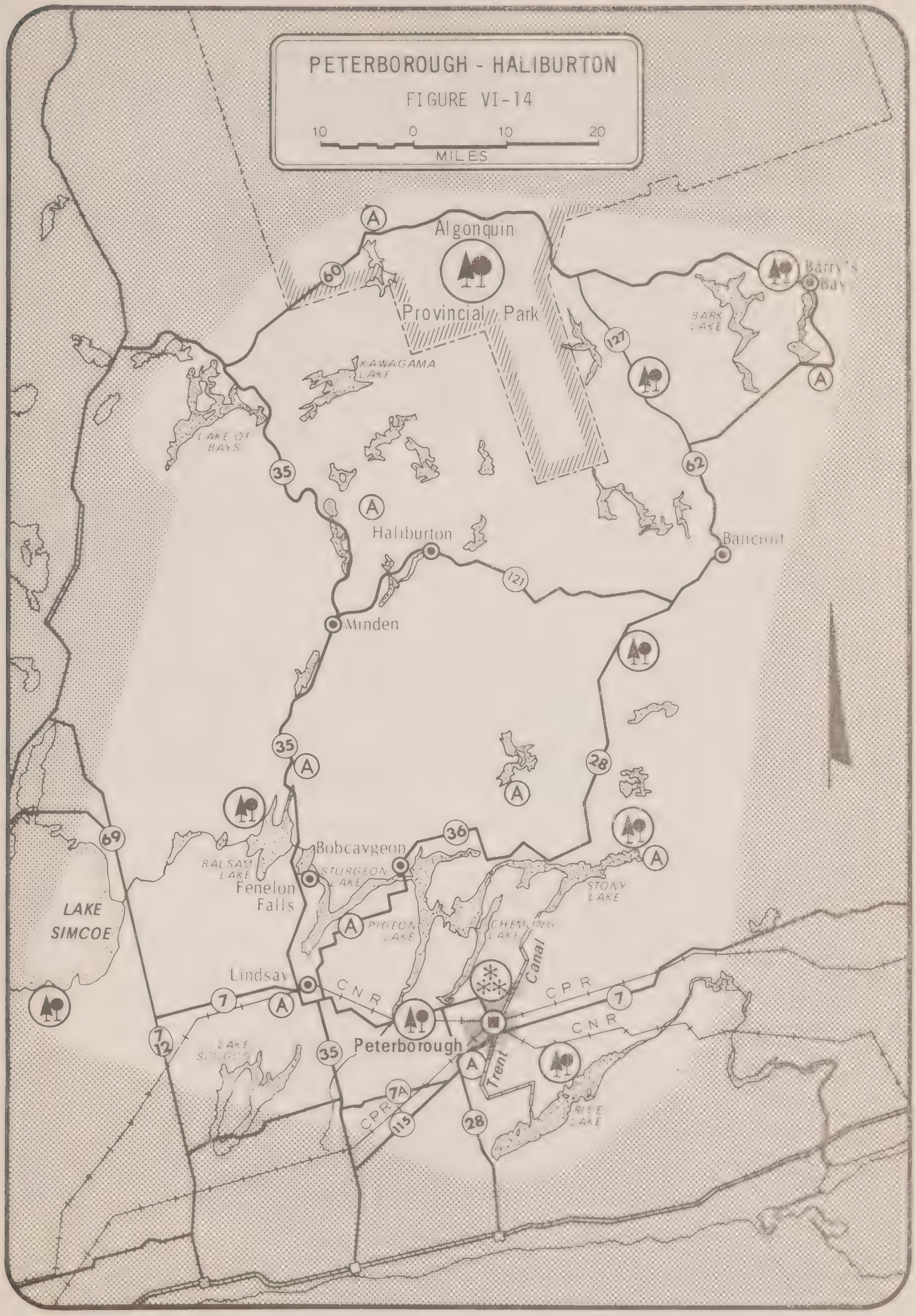

PETERBOROUGH - HALIBURTON
FIGURE VI-14
10 0 10 20
MILES
Algonquin
Provincial Park
KAWAGAMA LAKE
LAKE OF BAYS
BARK LAKE
Barry's Bay
Haliburton
Bancroft
Minden
Bobcaygeon
BALSAM LAKE
STURGEON LAKE
Fenelon Falls
STONY LAKE
LAKE SIMCOE
PIGEON LAKE
CHEMUNG LAKE
Lindsay
Peterborough
Trent Canal
CNR
CPR
RICE LAKE
A
60
127
35
62
121
28
36
69
7
7/12
35
7A
115

TABLE VI-19

ZONE SUPPLY INVENTORY - PETERBOROUGH-HALIBURTON

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. a concentration of major attractions and events throughout zone, most of which relate to the natural resource base (i.e., Serpent Mounds and Petroglyph Provincial Parks, Peterborough Lift Locks, Haliburton Highlands Festival of Colours, etc. . a number of highly-rated natural features capable of supporting intensive recreation uses - Kawarthas and Haliburton Highlands (swimming, boating, angling, camping and cottaging) . Canadian Shield topography - high potential for extensive recreation opportunities . contains corridor to Algonquin Park . contains part of Trent/Severn system	. a cluster of historical attractions near Peterborough (Century Village, Petroglyph and Serpent Mounds Provincial Parks) . forest industry interpretation in the southern section of Algonquin Provincial Park . Trent/Severn Canal system	. Peterborough is an area service centre. Local centres include Lindsay, Fenelon Falls, Bobcaygeon, Bancroft, Haliburton and Minden. Huntsville serves as an external local centre for northern sector . Peterborough - approximately 750 year-round accommodation units -approximately 700 private campsites -offers a variety of entertainment/dining/shopping opportunities . Lindsay, Fenelon Falls, Bancroft and Minden - total approximately 1275 hotel/motel/resort units -mostly year-round	. served by the Central Ontario Travel Association	. good access to zone from major highways (401 and 400/11) . good rail access (C.P.R., C.N.R.) . good boat access through Trent/Severn System . numerous airports with non-scheduled services scattered throughout zone - land and water bases . efficient internal road network (Highways 7, 28, 62, 60, 35) . more public transportation could improve internal travel circulation possibilities	Population - approximately 245,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 19% 25-54 years - approx. 35% greater than 54 years - approx. 20%
. current development closely related to natural features - highly seasonal . future potential for similar development, especially in northern section of zone - also extension of season		. Bobcaygeon and Haliburton - total approximately 1130 hotel/motel/resort units - mostly seasonal . over 2100 private campsites in most part concentrated on shoreline of Kawartha Lakes . 9 rovincial parks with campsites, including a portion of Algonquin Park . Toronto and Barry serve as external service centres			

TABLE VI-20

CURRENT TOURIST MARKET PATTERNS IN THE PETERBOROUGH-HALIBURTON ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Ontario Residents constitute the main visitation market 94% U.S. visitors form 4% and other province visitors 2% of the visitation market U.S. Visitors Ohio 32.3% New York 25.5% Michigan 17.9% Ontario Residents Central Ontario 83% for weekend trips and 72% for vacations Niagara 13% for vacations Lake Ontario 6% for weekend	All major activities occur mainly in the summer and shoulder seasons U.S. Visitors Trip Purpose: vacation at an Ontario resort 37.1% outdoor recreational activities 20.6% stay at cottage, cabin 18.2% Activities: fishing 34.6% motor boating 24.6% swimming 23.5% Ontario Residents Activities: recreational driving and touring 30% cottaging 28% motor boating 10%	U.S. Visitors resort lodge 26.6% own cottage 25.9% rented cabins/cottage 24.2% Ontario Residents cottage/chalet/hobby farm 72% other 9% tent/tent trailer 7%	Ontario Residents automobile 92% bus 5%	U.S. Visitors 4 or more nights 76.3% 3 nights 9.9% 1 night 6.6% Ontario Residents 1 week 36% 4-6 days 27% 2 weeks 26%	U.S. Visitors average party size 9.35 Age: 45-64 years 29.9% Income: $10,000-14,999 35.7% $15,000-24,999 33.1% Ontario Residents party size of 4 26% mainly families 38% Age: 20-34 years 28% for weekend trips 12-19 years 33% for vacations Education: high school 71% for weekend trips and 68% for vacations Income: $10,000-14,999 40% for weekend trips and 44% for vacations	U.S. Visitors $11,730,000 outdoor recreation/visiting cottage/resort 71% visiting friends/relatives 16% Ontario Residents $69,767,000 visiting friends/relatives 31% sightseeing/touring/Niagara Falls 21% Personal 20% Other Provinces $2,399,000 visiting friends/relatives 45% sightseeing/touring/Niagara Falls 33% Total Expenditures $83,896,000 U.S. 13.98% Ontario 83.16% Other Provinces 2.86%

forms favoured by this group. Ontario visitors tend to remain in the area for at least 4 to 6 days, residing in cottages/chalets/hobby farms, tents/tent trailers and other forms such as tourist homes.

In 1973, tourism receipts in the region totalled $83,896,000. Expenditures by the Ontario resident accounted for 83 percent of this total, expenditures by the U.S. group for 14 percent and those by other Canadians for 3 percent.

Future Potential

Peterborough-Haliburton is expected to become a year-round destination area. The relative importance of market groups will likely remain similar to that which exists at the present time. There is, however, a possibility that expanded development will result in increasing the appeal of the area for the American market.

Future development will, in all probability, focus on historical themes (e.g., fur trade, agriculture) as well as natural resources (e.g., lakes, canals, aesthetic shorelines and landscapes, and the 'accessible' wilderness). Activities which currently draw large numbers of visitors indicate the greatest potential for continuing development. Development that should accompany these activities includes the provision of 'more' and 'better' resorts, accommodations and other essential facilities and services, groomed cross-country ski and snowmobile trails, tour packages, events and historical attractions. Development opportunities in the relatively undeveloped northern section of the region merit special attention. It must be noted that there is some pressure to restrict further development in the Kawartha's area of the zone.

Development must be well planned and designed and ecologically sound in order that both the objectives of preservation and visitor use can be met.

10. Trenton-Cornwall

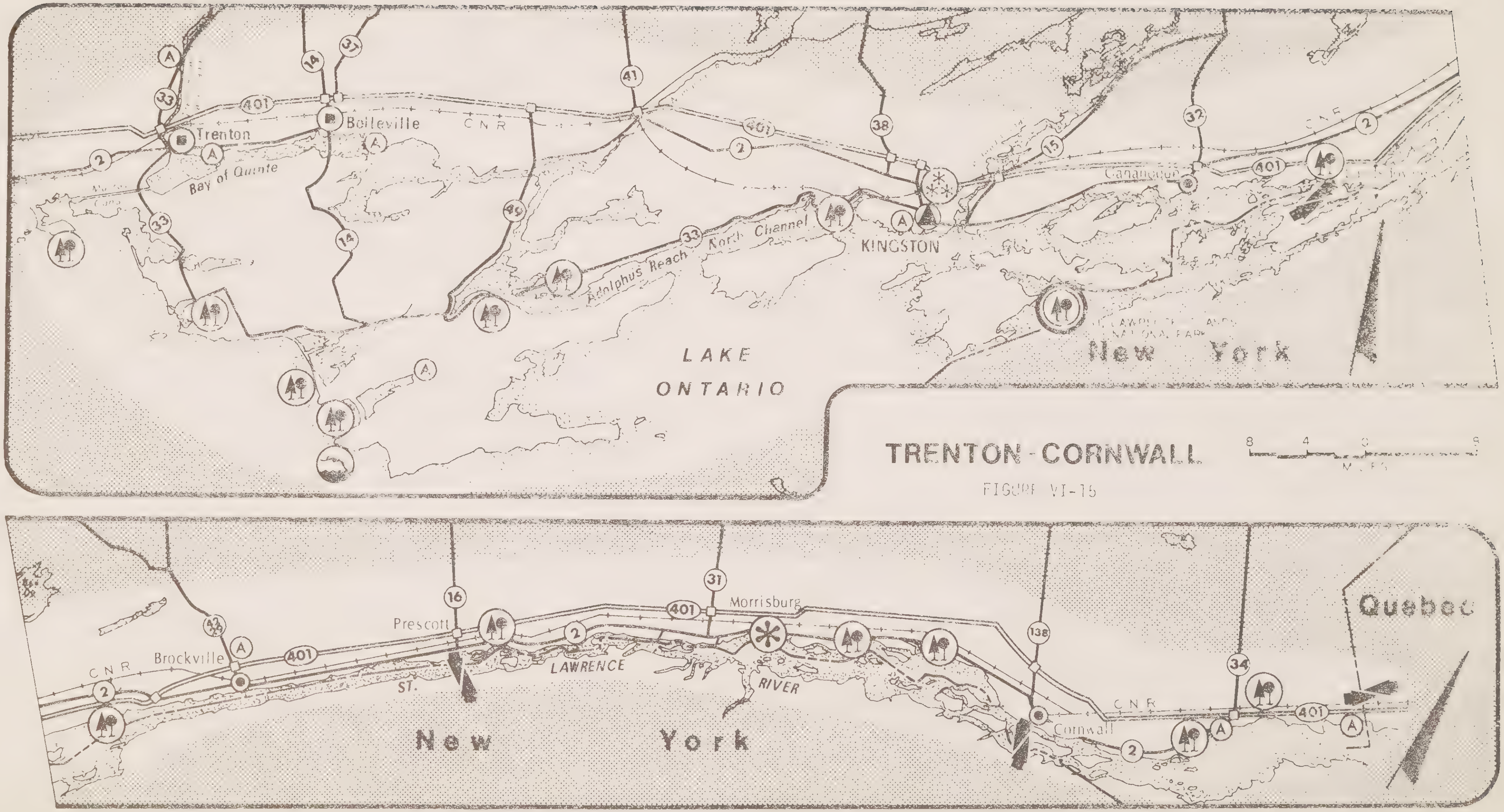
The attractiveness of this narrow, linear zone is highly dependent upon natural shoreline features and numerous major historical, cultural and educational attractions and events that are situated in conjunction with the area's urban centres (refer to Table VI-21 and Figure VI-15). This mix of natural and man-made opportunities should enable the zone to attract visitors throughout the year.

In the service centres, especially Kingston, year-round support facilities and services are available. There is also a great deal of highly seasonal supportive infrastructure (e.g., resorts, campsites, marinas) scattered throughout the zone. A problem area appears to that of accommodation: there needs to be improvement in both quality and quantity of resorts and hotel accommodation (especially in Kingston).

Transportation services which give access to Trenton-Cornwall include road, rail, bus, air and boat. The zone is highly accessible throughout the year. The main visitation group to this zone is the Ontario resident (41%) mainly from Central and Eastern Ontario (refer to Table VI-22). Other province visitors account for 38 percent of the total visitors with the majority of the remainder from the United States (21%). The primary activities for all market groups are cottaging and visiting friends or relatives; forms of accommodation used relate directly to these two primary activities. Length of stay in this zone tends to be 4 or more nights or 0 nights.

Within this zone there are 3 United States - Ontario border crossings, which might account for the high incidence of 1 day visitation by Americans (50%). The visiting parties tend to be families of 2 to 4 persons.

Total tourist receipts for this region in 1973 were $118,000,000; of which 38 percent was from the other Canadian visitors, 32 percent from Americans and 30 percent from the Ontario resident. Areas of expenditure relate to the primary activities of the zone--cottaging (30 percent by Americans) and visiting friends or relatives (29 percent by Ontario residents).



TRENTON - CORNWALL

FIGURE VI-15

TABLE VI-21

ZONE SUPPLY INVENTORY - TRENTON-CORNWALL

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. entire St. Lawrence shoreline, including the islands, have high capability for intensive recreation use (i.e., swimming, camping, cottaging, boating) . shoreline and islands also have high potential for extensive activities (i.e., viewing, hiking, etc.) . major beaches along shoreline . numerous parks (St. Lawrence Parks Commission) and government campsites along shoreline . gateway to Trent/ Severn system . zone highly dependent upon natural resource base, particularly shoreline - highly seasonal summer focus . most recreational activities based on natural resource features (i.e., Thousand Island boat trips, Seaway Locks, etc.) . future potential also appears to be around shoreline - possibility of extending the season	. zone has historical landscape with high potential for year-round visitation (i.e., Old Fort Henry (Kingston), Upper Canada Village (Morrisburg), etc. . Festival De la Semaine Francaise is a cultural event (Cornwall) based on French culture . educational attractions are located in Kingston (Royal Military College, Queen's University, etc.)	. Kingston serves as a regional service centre, Belleville/Trenton is an area centre, and Brockville, Gananoque and Cornwall are local service centres . Kingston - approximately 1500 year-round hotel/ motel units -around 600 private campsites -wide variety of entertainment/shopping/dining opportunities . Belleville/Trenton - serves southern portion of zone - around 700 hotel/motel units - limited services . Brockville/Cornwall - serves northern portion of zone -Brockville: approximately 500 hotel/motel units -Cornwall: around 600 hotel/motel units -500 to 1000 seasonal resort units . Gananoque - highly dependent on tourism, highly seasonal - approximately 650 seasonal resort units . 2 Provincial parks with campsites, plus numerous government campsites . medium density cottaging from Kingston to Gananoque	. served by the Eastern Ontario and Central Ontario Travel Associations . Travel Information Centres at Lansdowne, Johnstown (near Prescott) and Cornwall	. excellent, year-round access by road (Highway 401) and rail (C.N.R.) . 3 entry points from U.S.A. (Lansdowne, Prescott, Cornwall) . access to Lake Ontario, St. Lawrence shorelines by boat (i.e., major harbours at Kingston, Cornwall and Brockville). Access also through Trent/Severn and Rideau (River and Canal) system . potential for increasing boat access . numerous small air bases with non-scheduled services scattered throughout zone . internal road and rail linkage good . scenic coastal drive along Highway 2 (Heritage Route)	Population - approximately 200,000

TABLE VI-22

CURRENT TOURIST MARKET PATTERNS IN THE TRENTON-CORNWALL ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
The Ontario Resident (41%) and Visitors from other provinces (38%) are main visitation markets. U.S. visitors form 21% of the market U.S. Visitors New York 72.1% Pennsylvania 9.2% Ontario Residents Central Ontario 58% for weekend trips and 37% for vacations Eastern Ontario 21% for weekends and 29% for vacations	Main activities take place during the summer and shoulder seasons visiting friends/relatives and shopping are year-round activities U.S. Visitors Trip Purpose: visit friends/relatives 23.7% other non-business 11.8% stay at cottage, cabin 10.3% Activities: specialized shopping 21.9% fishing 20% swimming 18.4% Ontario Resident cottaging 32% visiting friends/relatives 30% shopping 13%	U.S. Visitors own cottage 23.7% rented cabin/cottage 23.3% trailer park campsite 18.4% Ontario Residents cottage/chalet/hobby farm 37% tent/tent trailer 25% home of friends/relatives 23%	Ontario Residents automobile 85% rail 5% other 4%	U.S. Visitors 0 nights 50.2% 4 or more nights 25.7% 3 nights 9.7% Ontario Residents 1 week 34% 4-6 days 32% 2 weeks 16%	U.S. Visitors average party size 22.23 persons Age: 20-34 years 34.6% Income: $10,000-14,999 29.8% $15,000-24,999 29.5% Ontario Residents party size of 4 30% mainly families 45% Age: 20-34 years 33% for weekend trips and 35% for vacations Education: highschool 57% for weekend trips and 52% for vacation Income: $10,000-14,999 35% for weekend trips and 38% for vacations	U.S. Visitors $37,463,000 outdoor recreation/visit cottage/resort 30% visiting friends/relatives 24% other business 11% Ontario Residents $35,734,000 visiting friends and relatives 29% sightseeing/touring/Niagara Falls 19% personal 19% Other Provinces $43,993,000 sightseeing/touring/Niagara Falls 41% outdoor recreation/visiting cottage/resort 20% visiting friends/relatives 20%

Future Potential

Within the past few years there has been a decrease in the number of American visitors and this is expected to continue in the near future (Tourism Development Officers, Small Business Operations Division, MIT). The main market groups, therefore, will likely continue to be the Ontario resident and other Canadians (predominantly from Quebec). The major throughway, Highway #401, carries a number of en route travellers. This represents a potential market group that could be encouraged to visit in the zone, depending on future development and promotion activities.

Cottaging and visiting friends or relatives will continue to be popular activities; however, the existing historical developments and the Thousand Islands/St. Lawrence Seaway, through more integrated development, could provide new destination and touring market opportunities. Historical, industrial and natural resource themes demonstrate the greatest potential for tourism development.

The location of the zone (e.g., midway between Toronto and Montreal, close to Ottawa) creates a development potential for meeting and convention facilities.

A number of requirements must be satisfied before the tourism industry can fully realize its development potential. Attractions, events and support facilities and services must be upgraded. Additions should be made to the tourism plant in response to demand (e.g., marinas). Attractions and events and the supportive infrastructure should be made operational during the winter months in order to increase visitation during this season. Careful and sensitive development, however, is the key to maintaining the high environmental quality which contributes so significantly to the attractiveness of this zone.

11. Renfrew-Kingston

The activities which can be supported in this rural resort area are highly dependent upon the natural environment. As Figure VI-16 and Table VI-23 illustrate, the zone is currently not intensively developed. Considerable tourism development is found only in the Rideau Lakes area. No major historical, cultural or man-made attractions exist outside of Kingston, but the historical and agricultural landscapes exhibit high potential for engendering tourism visitation.

The support facilities and services are highly seasonal throughout most of the zone. A considerable concentration of year-round accommodation is, however, available in Kingston. Visitors have expressed dissatisfaction with the quality of accommodation within this zone and have specifically indicated that there is a need for more resort development and better camping opportunities.

Road, bus, rail and boat access to the zone is good but the internal transportation network in this sizeable region could be improved. Winter climatic conditions hinder road travel within the Renfrew-Kingston zone.

Visitor participation in this zone is predominantly outdoor recreation oriented (cottaging, fishing, boating and swimming). (Refer to Table VI-24 Visiting friends or relatives is also a popular pastime, the majority of likely occuring in the Kingston, Perth, Smith Falls areas, where the population is concentrated.

Over half of the visitors to this zone are Ontario residents (52 percent), primarily from Eastern and Central Ontario. Approximately 35 percent of the visitors are from other provinces and 13 percent are from the United States. Direct tourism related expenditure in this zone was $24 million in 1973-74, of which 46 percent was contributed by Ontario residents, 32 percent by other Canadians and 22 percent by Americans.

Future Potential

In the near future, development in this zone is expected to centre around the attributes of the natural resource base, primarily lakes, rivers and aesthetic landscapes. Usage in the Renfrew-Kingston zone will likely continue to focus on cottaging and other water-based activities. It is anticipated that this zone will become a major cottaging area for

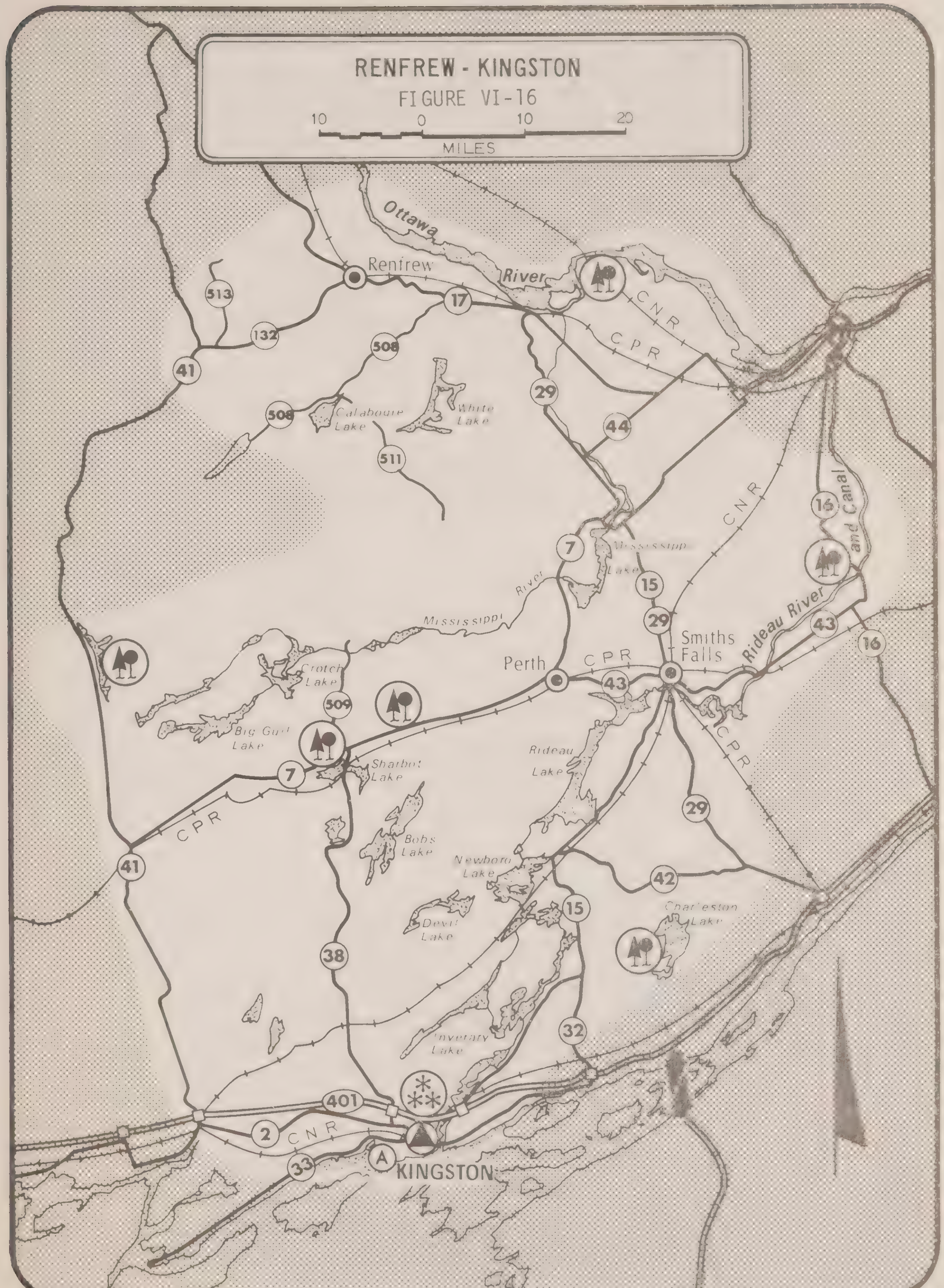

RENFREW - KINGSTON
FIGURE VI-16
10 0 10 20
MILES
Ottawa River
Renfrew
CNR
CPR
White Lake
Calabogie Lake
Mississippi Lake
Mississippi River
Perth
Smiths Falls
Rideau River
and Canal
Crotch Lake
Big Gull Lake
Sharbot Lake
Rideau Lake
Bobs Lake
Newboro Lake
Devil Lake
Charleston Lake
Inverary Lake
KINGSTON
513
132
41
17
508
29
44
511
511
7
15
16
43
509
38
42
32
401
2
33

TABLE VI-23

ZONE SUPPLY INVENTORY - RENFREW-KINGSTON

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. lake and rivers along Rideau Canal System and St. Lawrence shoreline, from Kingston to Gananoque, have potential for intensive recreational activity (swimming, camping, cottaging, boating, angling, etc.) . natural landscape capable of supporting extensive recreational activity - rugged Canadian Shield Topography . current development based heavily on natural resources - summer focus . potential for further development on the Rideau Waterway System	. attractions with historical emphasis at Kingston (i.e., Old Fort Henry, Bellevue House National Historic Site) . agricultural and small scale mining landscape in the north and west has potential for theme development . rich historical landscape with potential for tourism development - early settlement theme . educational attractions at Kingston include the Royal Military College and Queen's University . Rideau Canal system	. Kingston is a regional service centre. Local service centres are Smith Falls, Perth and Renfrew . Kingston - approximately 1500 year round hotel/motel units, around 600 private campsites -wide variety of dining/entertainment and shopping facilities . other local service centres provide essential services to local area . a relatively large number of private campsites near Carleton Place . 5 Provincial parks with campsites in zone . Ottawa serves as an external service centre	. the zone is served by the Central Ontario and Eastern Ontario Travel Associations	. excellent road (Highways 401, 17 and 7) and rail (C.N.R. and C.P.R.) access . boat access via the Rideau or Rideau/Trent/Severn Systems . internal road network is reasonably efficient	Population - approximately 221,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 19% 25-54 years - approx. 37% greater than 54 years - approx. 18%

TABLE VI-24

CURRENT TOURIST MARKET PATTERNS IN THE RENFREW - KINGSTON ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Approximately half of the visitor market comes from Ontario 52% 35% come from other provinces and 13% from the U.S. U.S. Visitors New York 54.7% Pennsylvania 18.8% Ontario Residents Eastern Ontario 70% for weekend trips and 56% for vacations Central Ontario 17% for weekend trips and 31% for vacations Lake Ontario 6% for weekend trips and vacations	Major activities occur mainly in the summer and shoulder seasons visiting friends/ relatives can occur year-round U.S. Visitors Trip Purpose: visit friends/ relatives 25.5% outdoor recreation activities 14.7% vacation at resort/ cottage 13.9% Activities: Fishing 20.4% Swimming 19.4% Motor boating 19.2% Ontario Residents Trip Purpose: visit friends/ relatives 37% for weekend trips and 26% for vacations cottaging 32% for vacations and 19% for weekend trips Activities: Fishing 11% for weekend trips Motor boating 10% for vacations	U.S. Visitors rented cabins/ cottage 37.1% home of friends/ relatives 18.9% own cottage 16.2% Ontario Resident cottage/chalet/ hobby farm 42% for weekends and 48% for vacation home of friends/ relatives 42% for weekend trips and 40% for vacations	Ontario Residents automobile 94% for weekend trips and 75% for vacations bus 3% for weekends and 9% for vacations boat 2% for weekend trips and 7% for vacations	U.S. Visitors 4 or more nights 46.3% 0 nights 22.9% 2 nights 12.8% Ontario Residents weekend trips: 2 days 39% 1 day 29% 3 days 16% vacations: 1 week 57% 4-6 days 29% 2 weeks 11%	U.S. Visitors Average party size 7.31 Age: 45-64 years 38% Income: $10,000-$14,999 45.8% Ontario Residents Party size: 2 persons for weekend trips 23% 3 persons for vacations 27% mainly families--39% for weekends and 51% for vacations Age: 12-19 years 40% for weekend trips and 42% for vacations Education: high school 69% for weekends and 68% for vacations Income: $10,000-$14,999 32% for weekend trips and 41% for vacations	U.S. Visitors $5,202,000 visit friends/ relatives 26% outdoor recreation/visit cottage/resort 23% Ontario Residents $10,905,000 visit friends/ relatives 30% sightseeing/ touring/Niagara Falls 19% personal 19% Other Provinces $7,457,000 sightseeing/ touring/Niagara Falls 44% visit friends/ relatives 22% Total Expenditures: $23,564,000 U.S. 22.08% Ontario 46.28% Other provinces 31.64%

the Ontario resident as new cottage development is evident now and other areas of the Province are becoming fully occupied. There is also potential for increasing resort development taking advantage of the 'accessible' wilderness and rural agricultural landscapes.

Development must be well-conceived and properly designed in order that the region's valuable resource assets are not degraded in the attempt to attract and satisfy more visitors. The poor water quality downstream from the Rideau River is already the cause of some concern. Since a considerable number of the most popular activities in this zone are water-oriented and dependent upon high water quality, water pollution is a problem that deserves special attention.

The lack of other types of attractions in this zone currently limits the form of participation and prevents the introduction of new markets. Much more could be developed upon the historical and cultural base of the Renfrew-Kingston zone. Attractions and events might centre around the early settlement theme, past and present-day agriculture and agricultural communities, the forest industry and the Rideau waterway.

As attractions expand, many decisions must be made regarding the locations for infrastructure and service expansion. Criteria for these locational decisions must reflect economic, physiographic and social considerations. Preliminary analysis points to Kingston, Smiths Falls, Perth and Renfrew as logical service centres. Ottawa also services the northern part of this zone. The type of supported infrastructure that is necessary will depend on the nature of future development.

Certainly, accommodation facilities, food services, entertainment opportunities and marina facilities should be improved and expanded in response to existing and future demand. The need for winterized facilities at this point in time is questionable. Intervening opportunities in the zones that are more accessible and closer to major markets will likely limit winter visitation to this area during the next few years.

12. Ottawa

Ottawa, the nation's capital, is an urban zone. Its atmosphere, however, is very different owing to the French influence, its setting along the courses of the Ottawa and Rideau rivers and its historical importance. The large concentration of major attractions and events that are situated in the national capital find their basis in a variety of themes (i.e., historical, cultural, educational, agricultural, recreational). These, in conjunction with existence of a diversity of shopping, dining and entertainment opportunities, give this attractive city year-round appeal. The supportive infrastructure not only serves the visitors to Ottawa but many of those who come to ski in areas just over the Quebec border.

There is access to the Ottawa zone by a variety of modes but routes tend to be indirect. There is no direct freeway access from Toronto or other major Ontario and United States population centres nor any direct air linkages with major national and international cities other than Toronto and Montreal. There is excellent schedule bus service and good rail access.

The main market groups to the Ontario zone are the Ontario residents (54 percent) and other Canadians (40 percent) with a United States visitation of only 6 percent. Total expenditure in this zone in 1973-74 amounted to approximately $80 million. Other Canadians, primarily residents of Quebec, contributed 48 percent of the tourist receipts with 42 percent coming from the Ontario resident and 10 percent from Americans.

It is apparent from Table VI-26 that the main activities of the travellers to this region are touring, visiting historic sites, specialized shopping and visiting friends and relatives. With the zone being dominated by an urban centre, the type of accommodation used tends to be hotels/motels or home of a friend or relative. Typical to most urban centres, the average length of stay in this zone is primarily one to four days.

Future Potential

Ottawa, being the nation's capital has great potential to attract a variety of markets. This zone's largest market probably lies in the business/convention trade. As a recreation destination, the activities will likely remain the same with touring and visiting historic sites and other

DESTINATION ZONE MAPS

MASTER LEGEND

Transportation Facilities

- Multi-lane Divided Highway (401)
- Major Two-lane Highway (7)
- Other Highway (503)
- Rail Passenger Service
- Navigable Canal
- International Airport
- Interprovincial Airport
- Other Airport (A)
- International/Provincial Border Entry Point

Service Centres and Facilities

- Provincial Centre
- Sub-Provincial Centre
- Regional Centre
- Area Centre
- Local Centre
- National Park
- Provincial Park
- Major Beach
- Major Attraction
- Attraction Cluster
- Major Event (E)
- Event Cluster

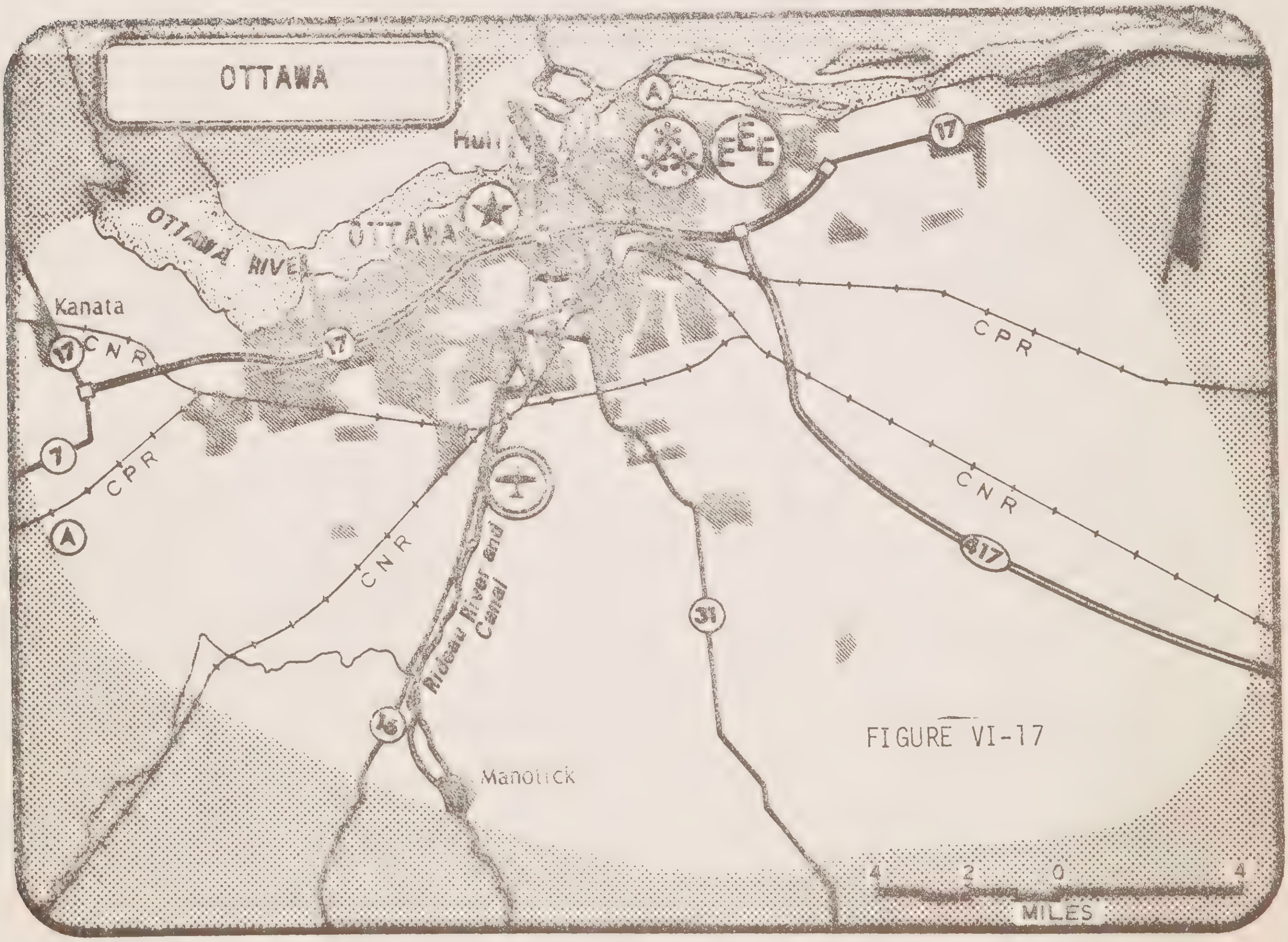


FIGURE VI-17

TABLE VI-25

ZONE SUPPLY INVENTORY - OTTAWA

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. large urban area set in pleasant, rural landscape - natural environment used to great advantage in parks and open space system . waterfront areas on 2 rivers (Rideau and Ottawa) - great aesthetic appeal and potential for outdoor recreation on a year-round basis (i.e., skating on the canal) . Lac Deschenes and Lac Des Chats - potential for intensive recreation opportunities (i.e., swimming, camping, cottaging, etc.) . in close proximity to excellent ski areas in Quebec - Ottawa functions as service centre for skiers	. large cluster of provincially and regionally significant attractions and events, including historical attrattions such as the Parliament Buildings, Canadian War Museum, Canada Post Office, etc., cultural ones such as the National Arts Centre, National Gallery of Canada, etc. and events such as Festival Canada . attractions and events based on recreational, educational and agricultural themes are also evident (i.e., (1) recreational attractions such as the Changing of the Guard, Rideau Canal Cruise, and events such as the Canadian Tulip Festival and Festival Canada; (2) educational attractions such as the National Museum of Man and National Museum of Natural Sciences; (3) agricultural events such as the Central Canada Exhibition . zone has year-round appeal and potential . extremely rich historical/cultural landscape with potential for tourism visitation . significant ethnic population of French origin	. National Capital . Ottawa is a service centre of sub-provincial significance . a diversity of accommodation, dining, entertainment and shopping facilities . approximately 5100 hotel/motel units and good support services make Ottawa a major convention centre . heavy concentration of private campsites primarily located east of the city . border crossing at Hull	. served by the Eastern Ontario Regional Travel Association	. situated along major road and rail routes (Highways 417, 17, 16, 31 and 7 and C.N.R. and C.P.R.) . inter-Provincial airport with flights to Toronto, Hamilton, North Bay, Sudbury, Thunder Bay and out of province . boat access via the Rideau Canal and the Ottawa River . good year-round access to city . well-developed internal transportation network and services . Excellent scheduled bus and good rail access	Population - approximately 507,000 Age Breakdown 0-14 years - approx. 26% 15-24 years - approx. 19% 25-54 years - approx. 40% greater than 54 years - approx. 15%

TABLE VI-26

CURRENT TOURIST MARKET PATTERNS IN THE OTTAWA ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Ontario Residents 54% and other province visitors 40% constitute main visitation markets U.S. visitors form 6% of market U.S. Visitors New York 36% Michigan 27% Ontario Residents Central Ontario 49% for weekend trips and 25% for vacations Eastern Ontario 22% for weekend trips Niagara 23% for vacations	Main activities occur in the summer and shoulder seasons. Those activities associated with the city occur year-round U.S. Visitors Trip Purpose: touring Ontario countryside 18% outdoor recreational activities 9% combined business/pleasure 8% Activities: visiting historic sites 50% specialized shopping 30.5% visiting museums/art galleries 11.5% Ontario Residents Activities: visiting friends/relatives 21% cottaging 17% motor boating and fishing 13% each	U.S. Visitors home of friends/relatives 51.8% hotel/motor hotel/motel 30% Ontario Resident home of friends/relatives 35% cottage/chalet/hobby farm 35% hotel/motel 19%	Ontario Residents automobile 77% air 9% bus 5%	U.S. Visitors 0 nights 33.4% 2 nights 21.8% 1 night 16.8% Ontario Residents 4-6 days 55% 1 week 25% 3 days 6%	U.S. Visitors average party size 2.8 persons Age: 20-34 years 36.1% Income: $15,000-24,999 32.2% Ontario Residents party size of 2 33% mainly families 31% Age: 20-34 years 36% for weekend trips 35-49 years 45% for vacations Education: high school 65% for weekend trips and 66% for vacations Income: $10,000-14,999 28% for weekend trips and 35% for vacations	U.S. Visitors $8,165,000 visiting friends/relatives 26% outdoor recreation/visiting cottage/resort 23% other non-business 13% Ontario Residents $33,627,000 visiting friends/relatives 28% personal 19% sightseeing/touring/Niagara Falls 16% Other Provinces $37,842,000 sightseeing/touring/Niagara Falls 44% visiting friends/relatives 22% outdoor recreation/visiting cottage/resort 11% Total Expenditures $79,634,000 U.S. 10.25% Ontario 42.23% Other Provinces 47.52%

urban attractions receiving the highest percentage of participation. It is anticipated that visitation will continue to be primarily weekend travellers or touring vacations that incorporate other destinations as well.

Its proximity to a large Quebec market will likely result in high visitation from this market group; however, its appeal to all Canadians should not be underestimated.

The perception, held by many, that this zone offers only short stay opportunities and that it is a weekend, rather than a vacation destination area can be changed. Ottawa must create a stronger identity as the nation's capital and as a vacation destination. Its future potential lies in the packaging of opportunities rather than the creation of new ones. Topical orientations which might prove useful in integrating opportunities include the national capital theme, the urban experience, historical themes (political, timber era, fur trading era) and the French ethnic theme.

The Ottawa zone provides many winter opportunities which require further development to increase visitation. These include skating on the canal, cross-country skiing, and winter events.

13. North Bay

The North Bay zone is centered around Lake Nipissing. The zone's appeal lies in the natural resource base which exhibits outstanding potential for supporting a great variety of intensive and extensive activities throughout the year.

Table VI-27 and Figure VI-18 describe the existing tourism plant. Development centres largely around Lake Nipissing, the zone's focal point. The most intensively developed areas include the north and east shorelines and West Arm of Lake Nipissing, the French River and the portion of the zone lying to the east of the lake. The lake's southern shoreline and the area to the south is characterized by relatively sparse development.

Tourism development, on the whole, tends to be fairly small-scale and highly seasonal. The quality of the support facilities, particularly accommodation and dining, requires improvement. Only in North Bay can a considerable concentration of support facilities and services be found on a year-round basis. The voyageur and fur trading themes have been developed to a minor degree in the North Bay area. The French Canadian influence is pervasive throughout the zone lending it a somewhat different atmosphere than that which is found in similar zones in Southern Ontario.

Access to the zone is adequate throughout the year. Winter climatic conditions hinder road travel to and especially within this zone.

Visitors to the North Bay zone tend to participate in water-based outdoor recreation activities such as fishing, canoeing, cottaging and camping, (refer to Table VI-28). The types of accommodations used are primarily private or rented cottages and tents/tent trailers. The zone appears to be a summer vacation destination area rather than weekend and attracts a high percentage of couples without children.

Approximately 78 percent of the visitors are Ontario residents, primarily from Central and Northwestern Ontario. The United States visitor accounts for 15 percent of the total visitation and other Canadians constitute 7 percent. The Ontario residents tourism expenditures made up 64 percent of the total receipts ($28 million) to the zone in 1973-74, with 31 percent from Americans and 5 percent from other Canadians.

DESTINATION ZONE MAPS

MASTER LEGEND

Transportation Facilities

- 401 Multi-lane Divided Highway
- 7 Major Two-lane Highway
- 503 Other Highway
- Rail Passenger Service
- Navigable Canal
- International Airport
- Interprovincial Airport
- A Other Airport
- International/Provincial Border Entry Point

Service Centres and Facilities

- Provincial Centre
- Sub-Provincial Centre
- Regional Centre
- Area Centre
- Local Centre
- National Park
- Provincial Park
- Major Beach
- Major Attraction
- Attraction Cluster
- E Major Event
- EEE Event Cluster

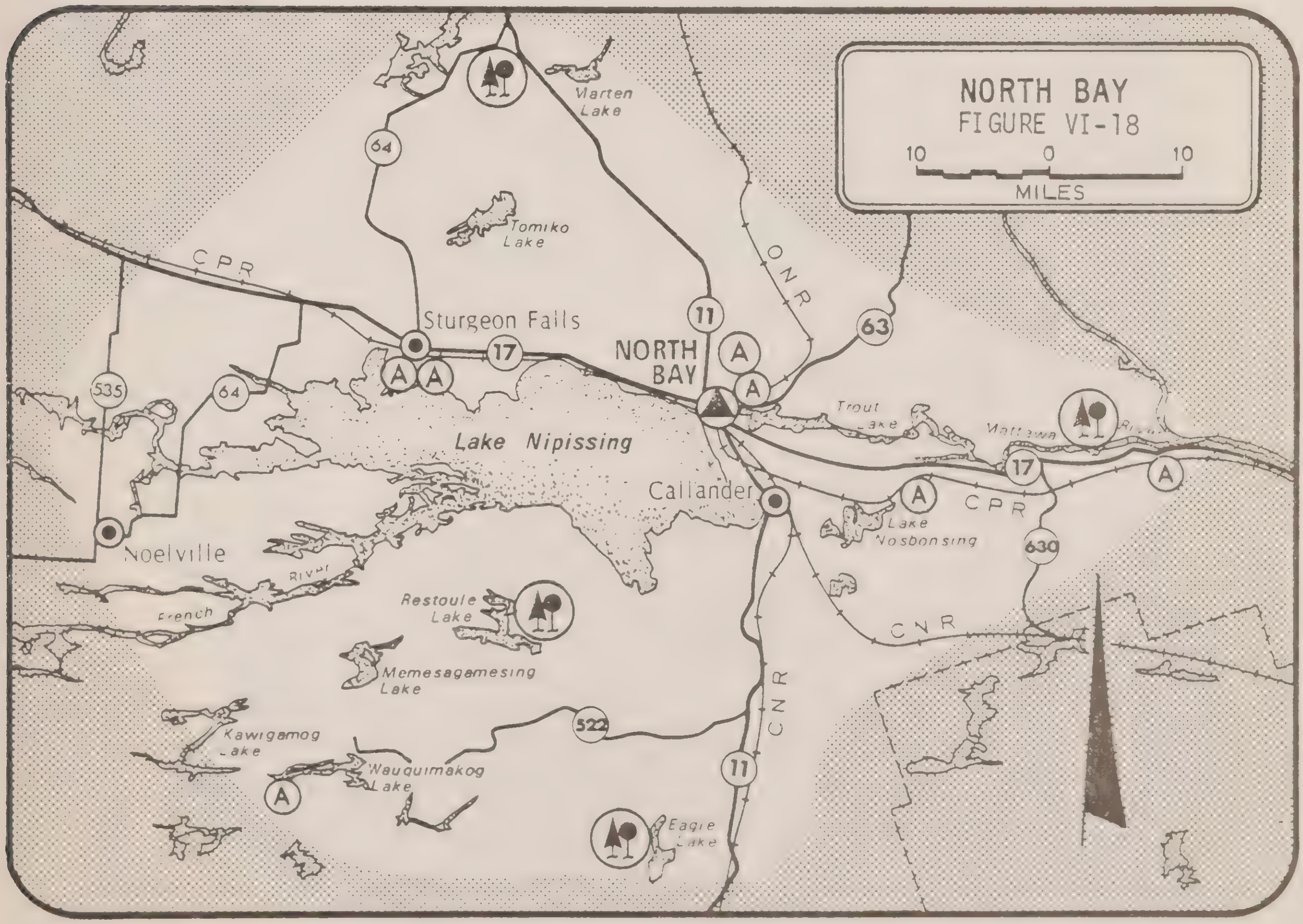


TABLE VI-27

ZONE SUPPLY INVENTORY - NORTH BAY

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. natural landscape is extremely interesting-large number of lakes and rivers . outstanding capability for a wide variety of recreational activities . most notable are extensive beaches on Lake Nipissing; high quality beaches on Trout Lake east of North Bay; waterfall areas and ski hills . scenic viewing an important activity; also lodging, camping, skiing, canoeing, etc. . fisheries, a primary attraction, are declining . potential as accessible wilderness areas . some potential for year-round development - currently the focus is summer season	. historical attractions and events at North Bay (i.e., Northern Ontario Trapper's Museum, North Bay Winter Fur Carnival) . the North Bay Winter Fur Carnival also provides recreational and social benefits . pre-historic and fur trade river transportation (Mattawa River)	. North Bay is a service centre of regional significance . local service centres include Sturgeon Falls, Callander, Powassan, Noelville and South River . North Bay provides a variety of dining/entertainment/shopping facilities -has approximately 1250 hotel/motel/resort units, most of which operate year-round small private campsite clusters . zone has 4 Provincial parks with campsites . numerous second homes along shore areas of Lake Nipissing, West Arm of Lake Nipissing and the French River	. zone served by the Almaguin-Nipissing and Rainbow Country Travel Associations	. good, year-round access via road (Highways 11 and 17), rail (C.N.R. and C.P.R.) and air (provincial airport at North Bay with daily flights to Toronto, Ottawa, Sudbury, Timmins, Sault Ste. Marie and Thunder Bay . good scheduled bus service to major centres . numerous small airports offering non-scheduled services scatteres in area (land and water-based) . internal circulation good in summer and adequate in winter . efficient network of internal roads but largely to secondary highway standards . opportunities for boating throughout zone - large craft on Lake Nipissing and small craft on the French River, West Arm and Trout Lake	Population - approximately 61,000 Age Breakdown 0-14 years - approx. 29% 15-24 years - approx. 20% 25-54 years - approx. 34% greater than 54 years - approx. 17%

TABLE VI-28

CURRENT TOURIST MARKET PATTERNS IN THE NORTH BAY ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Approximately 78% of the visitors are from Ontario 15% from the U.S. 7% from other provinces U.S. Visitors New York 36% Ohio 25% Michigan 17% Ontario Residents Central Ontario 35% for weekends 30% for vacations Northwestern Ontario 33% for weekend trips Lake Erie 27% for vacations	Usage occurs mainly in the summer with fishing occupying the shoulder season U.S. Visitors Trip Purpose: outdoor recreation activity 58% touring Ontario countryside 11% vacation at Ontario resort/cottage 10.7% Activities: Fishing 24% Canoeing 17% Swimming 16% Ontario Residents cottaging 30% fishing 17% motor boating 15%	U.S. Visitors trailer park/ campsite 38% home of friends/ relatives 18% hotel/motor hotel/motel 17% Ontario Residents cottage/chalet/ hobby farm 48% tent/tent trailer 13%	Ontario Residents automobile 85% bus 6%	U.S. Visitors 4 or more nights 84% 3 nights 8% Ontario Residents 1 week 39% 4-6 days 34% 2 weeks 16%	U.S. Visitors Average party size 2.9 Age: 20-34 years 41% Income: $15,000-$24,999 29.6% Ontario Residents Party size of 2 36% highest percentage travel in couples 28% Age: 20-34 years 46% for weekend trips 40% for vacations Education: high school 61% for both weekends and vacations Income: $10,000-$14,999 26% for weekend trips 52% for vacations	U.S. Visitors $8,800,000 outdoor recreation/ visit cottage/ resort 48% sightseeing/touring/ Niagara Falls 23% visit friends/ relatives 14% Ontario Residents $18,200,000 visit friends/ relatives 29% sightseeing/ touring/Niagara Falls 20% personal 19% Other Provinces $1,500,000 visit friends/ relatives 55% sightseeing/ touring/Niagara Falls 36%

Future Potential

Usage in this zone will likely continue to be outdoor recreation oriented with visitation occuring primarily during the summer months and fishing providing some visitation during the 'shoulder' season.

Distance from major markets, intervening opportunities and a lack of major man-made attractions will likely prevent this area from becoming a weekend or winter destination in the near future.

The Ontario resident is expected to remain the main market group. There appears to be some potential for this zone to increase its visitation by encouraging family visitation and urging the pass-through market travelling the Trans Canada to stop and enjoy the zone. In order to draw upon these markets, however, the tourism plant, in particular the resorts, must be upgraded and the variety of attractions and events improved. Furthermore, the North Bay zone must create an image as a destination area. Certainly, the area has to date not utilized its location along the historic route of the Voyageurs, the French Canadian population concentration and the 'accessible' wilderness and access to wilderness themes as integrative mechanisms.

In view of the importance of the natural resource base in this area, development must be well-planned and sensitive to environmental considerations. There is already concern about the declining sports fisheries in Lake Nipissing and French River. Accordingly, fishing must be de-emphasized as a trip purpose. It should be regarded instead as one recreational experience in a package of many.

14. Sudbury

The Sudbury zone is a predominantly natural based area and contains an interesting array of water settings. In many ways its development is similar to that in North Bay; the natural resource base has potential for supporting a variety of intensive and extensive activities in all seasons. The two zones overlap in the Noelville area having in common such features as the West Arm of Lake Nipissing and the French River area east of Highway 535. While the North Bay zone centres around Lake Nipissing, development in the Sudbury area centres around a number of distinct natural environments:

1. the river country surrounding the French and Pickerel Rivers;
2. the Killarney area lakes and rivers; and
3. the Georgian Bay coastal region.

Development throughout the zone is for the most part, highly seasonal and small-scale. Many of the resorts are of inadequate quality for family visitation, having been converted in recent years from hunting and fishing camps. The voyageur theme in the French River area and the mining theme in the city of Sudbury have become the basis for a few attractions, events and tours. The influence of the French Canadian culture is evident in the French River area and in the city of Sudbury, and that of the Native Indian in the Killarney area and also in the French River.

As a service centre, Sudbury dominates the zone. It provides services to the tourism industry (wholesaling, laundry, printing, accounting, etc.), as well as direct services to visitors on a year-round basis. Killarney, Alban and Noelville offer essential services to travellers on a seasonal basis (refer to Table VI-29and Figure VI-19for additional detail about existing development).

The zone is readily accessible by road, air, bus, rail and boat. Travel on major highways (17 and 69) is not difficult during the winter months, but winter climatic conditions do limit travel on secondary roads in the area.

Usage in the zone is very similar to that of the North Bay Zone but a different water-oriented recreation experience is provided, because

DESTINATION ZONE MAPS

MASTER LEGEND

Transportation Facilities

- 401 Multi-lane Divided Highway
- 7 Major Two-lane Highway
- 503 Other Highway
- Rail Passenger Service
- Navigable Canal
- International Airport
- Interprovincial Airport
- A Other Airport
- International/Provincial Border Entry Point

Service Centres and Facilities

- Provincial Centre
- Sub-Provincial Centre
- Regional Centre
- Area Centre
- Local Centre
- National Park
- Provincial Park
- Major Beach
- Major Attraction
- Attraction Cluster
- E Major Event
- EEE Event Cluster

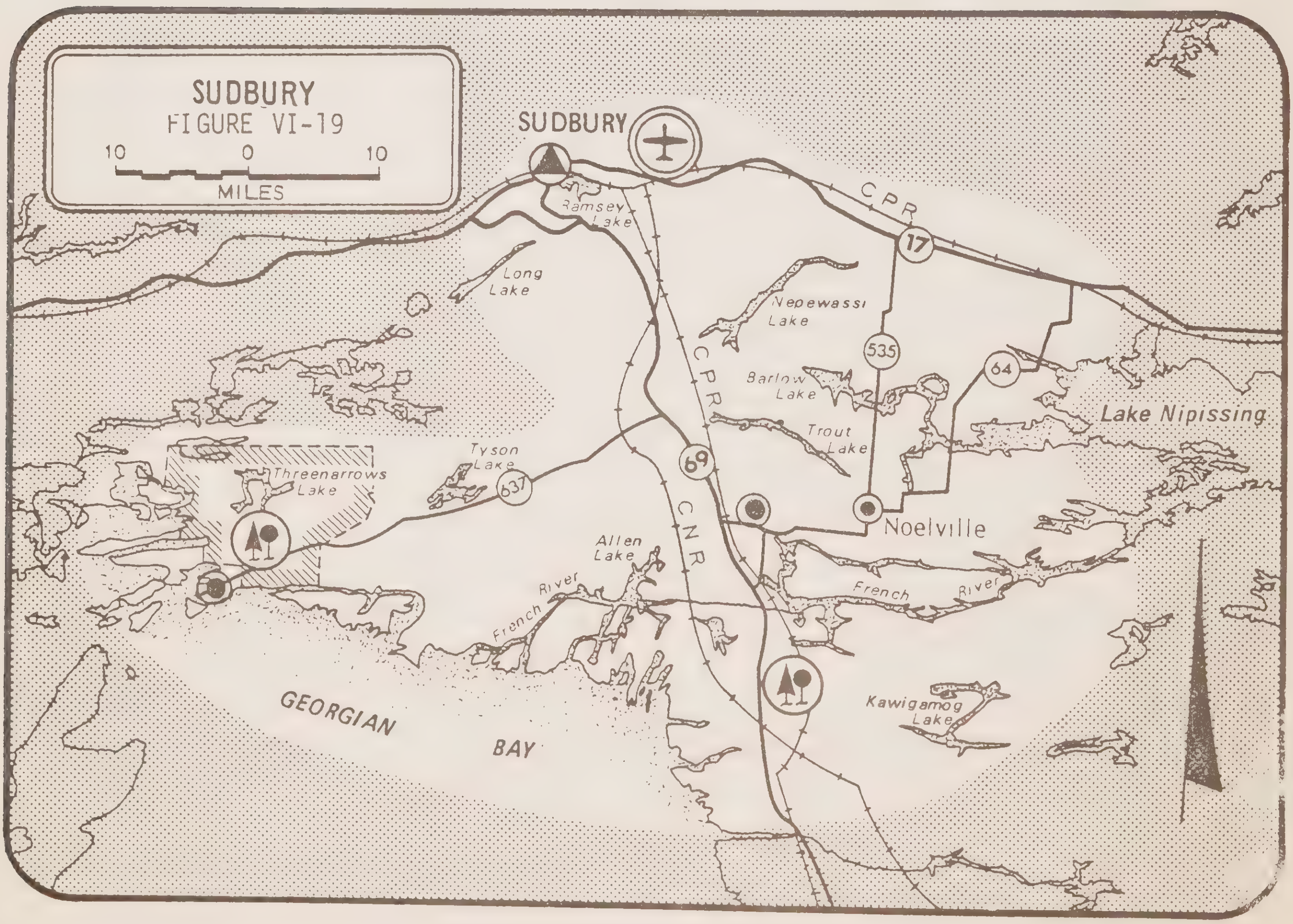


TABLE VI-29

ZONE SUPPLY INVENTORY - SUDBURY

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. French River area - outstanding capability for a variety of recreational activities . Killarney Provincial Park on Killarney Bay - deep water harbours, excellent viewing, topographic variety, beaches, logging sites, etc. . zone has high to very high capability for extensive recreational activity-forested Canadian Shield landscape, numerous lakes and rivers . fisheries, a primary attraction, are declining . future potential - development as accessible wilderness areas . some potential for year-round development - currently a summer orientation	. significant concentrations of persons of French ethnic origin . some historical attractions around Sudbury (i.e., Canadian Centennial Numismatic Park) . Laurentian University is an educational attraction	. Sudbury serves as a regional service centre. Local centres include Killarney, Alban and Noelville . Sudbury - provides indirect and some direct services - approximately 1350 hotel/motel/resort units, almost all year-round operations - approximately 300 private campsites . Alban and Noelville-around 430 accommodation units, mostly seasonal . Alban - approximately 200 private campsites . 2 Provincial parks with campsites in zone . numerous second homes along the French River and on lakes in the Killarney area	. served by the Rainbow Country Travel Association	. good year-round access via road (Highways 69, 17) rail (C.N.R. and C.P.R.) air (inter-provincial airport at Sudbury) and boat (access along North Channel at Killarney, Britt and Key Harbour, but no penetration of large craft beyond these points . daily scheduled air services to Ottawa, Toronto, North Bay, Timmins, Earlton, Kapuskasing, Sault Ste. Marie, Thunder Bay and out of province . daily scheduled bus service to and from major centres . internal circulation good in summer and adequate in winter . small craft boating opportunities along the French River and Killarney Lakes	Population - approximately 120,000 Age Breakdown 0-14 years - approx. 31% 15-24 years - approx. 21% 25-54 years - approx. 37% greater than 54 years - approx. 11%

TABLE VI-30

CURRENT TOURIST MARKET PATTERNS IN THE SUDBURY ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Largest origin group to this zone is the Ontario resident approximately 85% 4% from the U.S. 11% from other provinces U.S. Visitors New York 36% Ohio 25% Michigan 11% Ontario Residents Central Ontario on weekends 35% on vacation 30% Northwestern Ontario 33% on weekends Lake Erie 27% for vacations	Predominantly summer visitation with cottaging taking place year-round U.S. Visitors Trip Purpose: outdoor recreation activities 58% touring Ontario countryside 11% vacation at resort/cottage 10.7% Activities: Fishing 24% Canoeing 17% Swimming 16% Ontario Residents cottaging 30% fishing 17% motor boating 15% High percentage of visiting friends and relatives on weekend trips	U.S. Visitors trailer park/campsite 38% home of friends/relatives 18% hotel/motor hotel/motel 17% Ontario Resident cottage/chalet/hobby farm 48% tent/tent trailer 13%	Ontario Residents automobile 85% bus 6%	U.S. Visitors 4 or more nights 84% 3 nights 8% Ontario Residents 1 week 39% 4-6 days 34% 2 weeks 16%	U.S. Visitors Average party size 2.9 persons Age: 20-34 years 41% Income: $15,000-$24,999 29.6% Ontario Residents Party size of 2 36% highest percentage travel in couples 28% Age: 20-34 years 46% for weekends 40% for vacations Education: high school 61% each for weekends and vacations Income: $10;000-$14,999 36% for weekends 52% for vacations	U.S. Visitors $2,600,000 outdoor recreation/visit cottage/resort 43% sightseeing/touring/Niagara Falls 23% visit friends/relatives 14% Ontario Residents $13,000,000 visit friends/relatives 29% sightseeing/touring/Niagara Falls 20% personal 19% Other Provinces $2,400,000 visit friends/relatives 55% sightseeing/touring/Niagara Falls 36%

activities focus on rivers and small lakes with some open water opportunities along the shore of Georgian Bay. Visitation is primarily during the summer with cottages and campgrounds providing the main forms of accommodation. A slow trend toward winterization of cottages is evident in this zone, thus increasing year-round visitation.

The largest origin group to this zone is the Ontario resident constituting 85 percent of the total person visits in 1973; four percent of the visitation was from the United States and 11 percent from other provinces. Total tourist receipts to this zone were approximately $18 million in 1973. The Ontario residents' expenditures were approximately 72 percent of the total, with the remaining received from other Canadians (13 percent) and Americans (15 percent).

Future Potential

It is anticipated that this zone will continue to be a summer vacation destination in the next few years. The distance from major markets, lack of major attractions and winter opportunities and intervening opportunities preclude weekend visitation and a high degree of winter utilization. The development of more and better wilderness resorts, however, could lead to a gradual extension of the season over the long term. Any attempt to extend the season would likely be more successful if accompanied by an increasing number of man-made attractions and events, an improvement and diversification of the support facilities and services and an increase in the reliability of public transportation during the winter.

The Sudbury zone's major market is likely to continue to be the Ontario resident, primarily from Northeastern and Central Ontario. The appeal which has the potential to capture a larger market is its undeveloped/accessible wilderness atmosphere. The activities which are expected to continue to draw visitation are boating of all varieties, casual fishing, hunting, cottaging and outdoor recreation in general. An additional market which is currently not tapped, but which has potential in this area, is that for small business meetings.

This zone must develop a more distinctive image as a destination zone. Topics that could contribute to the zone's identity include those

based on the voyageur route, mining, 'accessible' wilderness, access to wilderness and 'Rainbow' or river country.

The attractive wilderness setting must be preserved through cautious, well-planned development. As in North Bay, the declining fisheries are of some concern and the importance of fishing as a trip purpose must be de-emphasized and family-oriented recreation experience should become a main attraction.

15. Sault Ste. Marie - Wawa

This coastline zone contains a variety of natural resources that exhibit outstanding potential for year-round intensive and extensive recreation. Sault Ste. Marie-Wawa features some of the most exciting shoreline and inland scenery in Ontario. While development has been largely concerned with the provision of natural resource-oriented recreational opportunities, there has been some focus on the historical and cultural resources of the area. To date, development has largely been concentrated in the southern portion of the zone, in Sault Ste. Marie and along the Trans Canada Highway. Scattered development in the zone's interior appears to relate primarily to hunting and fishing activity.

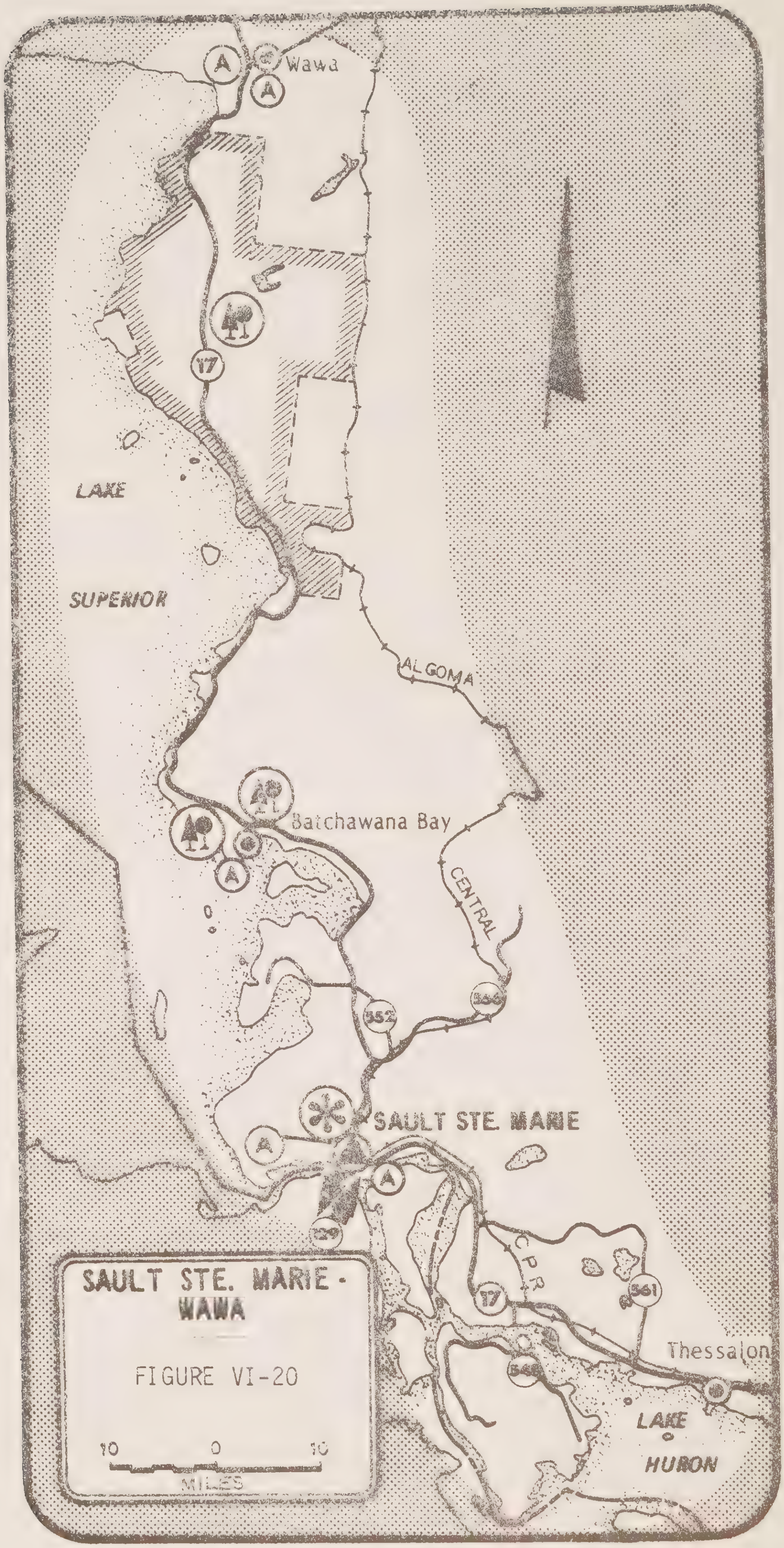
Sault Ste. Marie, the only large centre in the zone, functions as an attraction. In addition to providing direct services to the visitors, the city supplies the tourism industry with goods and services. Sault Ste. Marie supports year-round tourist facilities and services, while Wawa, Thessalon and Batchawana Bay are primarily seasonal. The air bases within the zone support some fly-in operations to outlying areas. Figure VI-20 and Table VI-31, in combination, present a more detailed supply inventory for this zone.

Access to this zone by road, air, rail, but and boat is adequate. In winter, however, travel on secondary roads is difficult.

Visitor dissatisfaction with the existing tourism plant relates to the poor quality and pricing of accommodation, camping facilities and outfitting services. The lack of man-made attractions, unreliable winter service by public transportation, and distance from major markets are other problems.

Usage in the Sault Ste. Marie-Wawa zone is a mix of outdoor recreation activities, touring and visiting friends and relatives. This mix of activities is reflected in the types of accommodation used by visitors (e.g., hotels/motels, cottages, cabins and homes of friends or relatives). The zone attracts the 1 day excursionist (primarily from the United States), the weekend traveller and vacationers (refer to Table VI-32).

Traveller expenditures in this zone were approximately $37,000,000 in 1973, of which a high percentage was spent on sightseeing and touring. The market group which spent the most in this zone is the American visitor,



Wawa
LAKE
SUPERIOR
ALGOMA
Batchawana Bay
CENTRAL
SAULT STE. MARIE
C P R
Thessalon
LAKE
HURON
SAULT STE. MARIE - WAWA
FIGURE VI-20
10 0 10
MILES

TABLE VI-31

ZONE SUPPLY INVENTORY - SAULT STE. MARIE-WAWA

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. current development based primarily on natural features . concentration of natural features exhibiting outstanding capability for intensive recreation -St. Joseph's Island (beaches, camping, lodges) -Batchawana-Goulais Bays and Agawa Canyon (beaches, excellent viewing, deep water harbours, Indian pictographs at Agawa Bay -rugged inland terrain potential for ski hills and viewing -Lake Superior Provincial Park	. significant concentration of persons of Native Indian and Italian ethnic origin . historical landscape along the Lake Superior shoreline has high potential for tourism visitation and year-round development . heavy recreational emphasis in the zone (i.e., Agawa Canyon Rail Excursion, Bon Soo Winter Carnival, Algoma Maple Festival, Searchmont Ski Hills, etc.)	. Sault Ste. Marie serves as a regional service centre, with Wawa, Batchawana Bay and Thessalon acting as local centres . Sault Ste. Marie - supplies direct and indirect services -approximately 1200 hotel/motel/resort units, the majority of which are non-seasonal -around 500 private campsites . offers a variety of dining/entertainment/shopping facilities . a border city . Wawa and Thessalon provide approximately 600 hotel/motel/resort units, almost half of which are seasonal -approximately 340 private campsites around Wawa . numerous small towns offering essential services to tourists . 2 Provincial parks with campsites	. located within the Algoma Kinniwabi Travel Association Region . Travel information centre at Sault Ste. Marie	. good access via road (Highway 17), air (Sault Ste. Marie - Provincial airport - daily scheduled service on Air Canada and Nor Ontair) and boat (major harbours at Sault Ste. Marie, Sault Canals, and Michipecoten and smaller harbours at Goulais, Batchawana and Agawa Bays . good scheduled bus service to and from major centres . limited rail service to Sault Ste. Marie (CPR) . regional airport with scheduled service at Wawa . access from U.S.A. at Sault Ste. Marie border point . good internal circulation via road, rail (Algoma Central) and boat (along Lake Superior shoreline) . in winter, travel on secondary roads difficult	Population - approximately 128,000 Age Breakdown 0-14 years - approx. 31% 15-24 years - approx. 20% 25-54 years - approx. 36% greater than 54 years - approx. 13%

TABLE VI-32

CURRENT TOURIST MARKET PATTERNS IN THE SAULT STE. MARIE - WAWA ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Majority of visitors come from Ontario 62% however, a fairly high percentage come from the U.S. 29% 9% come from other provinces U.S. Visitors Michigan 73.5% spread out over remaining states Ontario Residents Northeastern Ontario 76% for weekend trips and 34% for vacations Central Ontario 6% for weekend trips and 26% for vacations	Majority of activities occur during the summer and shoulder seasons. However, several can occur year-round. U.S. Visitors Trip Purpose: touring 38.2% outdoor recreation activities 13.7% other non-business 10.4% Activities: attending special events 26.8% fishing 17.1% motor boating 13.3% Ontario Residents visit friends/ relatives 55% on weekend trips and 45% for vacations recreational driving/ touring 13% on vacations cottaging and shopping 8% for weekend trips	U.S. Visitors rented cabins/ cottages 25.1% own cottage 18.4% hotel/motor hotel motel 18.4% Ontario Residents home of friends/ relatives 58% for weekend trips and 50% for vacations hotel/motel 30% for vacations and 12% for weekend trips cottage/chalet/ hobby farm 18% for weekends	Ontario Residents automobile 81% for weekend trips and 98% for vacations other 9% for weekend trips	U.S. Visitors 0 nights 46.9% 4 or more nights 21.7% 2 nights 14.4% Ontario Resident weekend trips 2 days 43% 1 day 27% 3 days 16% vacations 4-6 days 51% 1 week 46%	U.S. Visitors Average party size 3.15 Age: 45-64 years 31.2% Income: $10,000-$14,999 45.6% Ontario Residents party size of 2 26% for weekends 25% for vacations mainly families 37% for weekends 41% for vacations Age: 35-49 years 30% for weekends 38% for vacations Education: high school 56% for weekends 57% for vacations Income: $10,000-$14,999 33% for weekends 49% for vacations	U.S. Visitors $17,040,000 sightseeing/ touring 32% outdoor recreation/ visit cottage/resort 31% visit friends/ relatives 12% Ontario Residents $15,520,000 visiting friends/ relatives 30% personal 20% sightseeing/ touring 17% Other Provinces $4,880,000 sightseeing/ touring 46% visiting friends/ relatives 29% Total Expenditures: $37,440,000 U.S. 45.51% Ontario 41.45% Other Provinces 13.03%

accounting for 46 percent of the total. The remainder was divided between the Ontario resident (41%) and the other Canadians (13%). This expenditure breakdown, however, cannot be directly related to the percentage of visitors by origin. The largest origin group to visit this zone was the Ontario resident (approximately 62%). A relatively high percentage of visitation comes from the United States (29%) with the remaining 9 percent from other provinces.

Future Potential

This zone, with its mix of scenic landscapes, urban attractions and cottaging and boating opportunities, has the potential to appeal to many markets. The intervening opportunities available to the large population concentrations in southern Ontario and limited rail and air services connecting this zone currently present limitations in capturing a large market; however, as areas providing similar experience become overused or as new and unique development occurs, this zone will have greater appeal. The fall and winter opportunities (fall colour tours, skiing and the Agawa Canyon winter train excursion) have the potential, through proper planning and development, to increase winter visitation to the Sault Ste. Marie-Wawa zone.

To engender greater visitation, existing opportunities must be 'packaged' and investment made in new attractions, events, and in the diversification and improvement of the existing tourism plant. In addition, the identity of the zone must be established. Numerous themes show promise for unifying development within the zone. These include:

a. historical themes relating to the military history of the zone, to the fur trading era, to forestry and mining;
b. ethnic themes relating to the Italian population in Sault Ste. Marie and to the native Indian population;
c. industrial themes based on the shipping industry; and
d. natural resource-based themes focusing on the shoreline, natural landscapes, 'accessible' wilderness and access to wilderness.

16. Thunder Bay

The Thunder Bay zone centres around a mix of natural resource-based and urban development. The numerous natural attractions located in the immediate environs of the city offer varied recreational opportunities. Man-made attractions, such as the ski resorts and Old Fort William, also draw considerable visitation. The city, itself, is an attraction. Thunder Bay functions as a significant convention centre and as the service centre for the zone and its hinterland. The city provides all of the major essential services to visitors and also indirect services to the tourism industry. Airports within the zone are bases for a number of fly-in operations. (Table VI-33 and Figure VI-21 illustrate the existing development.) Deficiencies in the current plant relate to the lack of resort-type facilities in the area, the lack of marinas and a variety of major attractions and events. Visitors have voiced dissatisfaction with the quality and high prices of accommodation, the camping facilities and the outfitting services.

Access to the zone is adequate and visitors can utilize a variety of transportation modes to reach the area. Winter road access, however, is hindered by climatic conditions.

The Thunder Bay zone receives visitation primarily from the Ontario resident--predominantly from Northern Ontario on weekend trips, with substantial visitation from Central Ontario residents on vacation trips. Other Canadians comprise 20 percent of the total visitation to this zone with 10 percent from the United States. The tourism related expenditure in this zone was approximately 24.5 million in 1973, over 80 percent by Ontario residents.

The fine natural resource base accounts for the high participation in outdoor recreation activities, such as fishing, cottaging and boating. Other activities, such as visiting friends or relatives and shopping occur predominantly in Thunder Bay. The mix of accommodation used by visitors to this zone (hotels/motels, camping and home of friends or relatives) represents the varied opportunities available within the region. Table VI-34 outlines the current market consumption patterns.

DESTINATION ZONE MAPS

MASTER LEGEND

Transportation Facilities

- 401 Multi-lane Divided Highway
- 7 Major Two-lane Highway
- 503 Other Highway
- Rail Passenger Service
- Navigable Canal
- International Airport
- Interprovincial Airport
- A Other Airport
- International/Provincial Border Entry Point

Service Centres and Facilities

- Provincial Centre
- Sub-Provincial Centre
- Regional Centre
- Area Centre
- Local Centre
- National Park
- Provincial Park
- Major Beach
- Major Attraction
- Attraction Cluster
- E Major Event
- Event Cluster

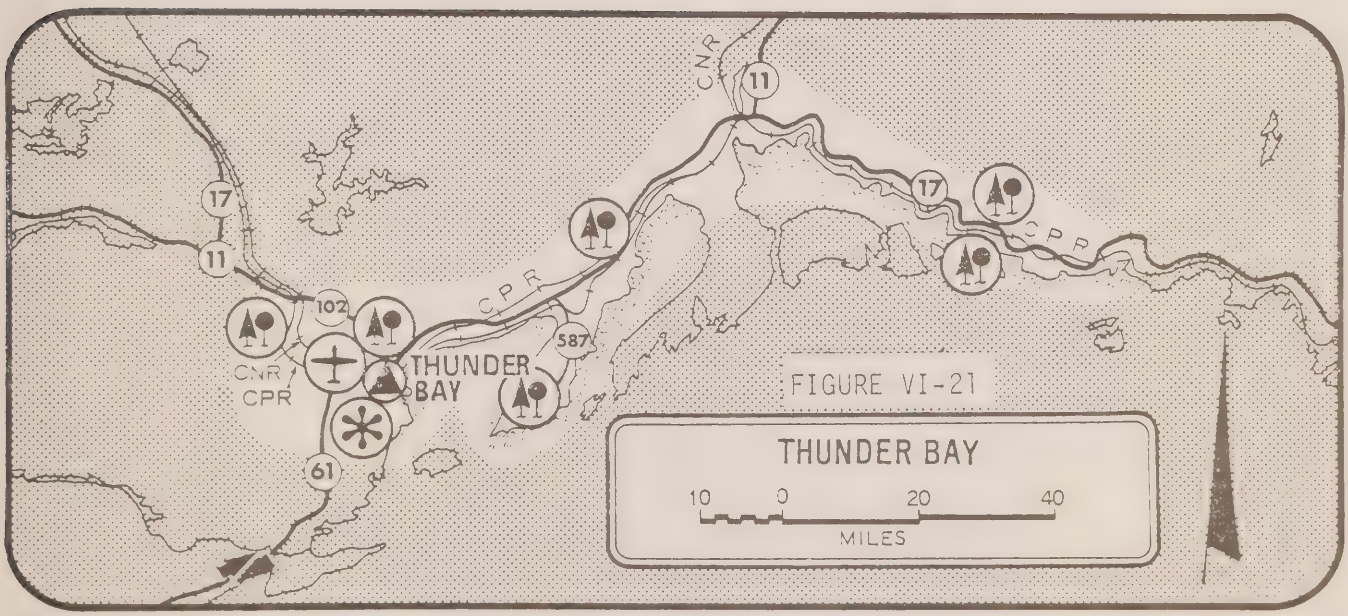


FIGURE VI-21

THUNDER BAY

TABLE VI-33

ZONE SUPPLY INVENTORY - THUNDER BAY

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. concentration of natural features with outstanding capability for intensive recreation -Thunder Bay: ski hills, excellent viewing, rock formation -Sibley and Black Bay Peninsulas: excellent viewing, impressive rock formations, beaches, harbours, lodging sites -Ouimet Canyon: waterfalls and Arctic flora -a series of lakes surrounding Thunder Bay- beaches, lodges, camping areas and waterfalls -Kakebeka and Aquasabon Falls: scenic viewing, rock formations . natural landscape provides high capability for extensive recreation activity . potential for year-round visitation . sensitive areas along shoreline - development must proceed with caution	. currently developed attractions and events are based on natural and historical features . a major historical attraction in Thunder Bay (Old Fort William) . historical landscape with high potential for visitation . significant concentrations of numerous ethnic origins (French, Polish, Ukrainian, Native Indian and Finn) -largest concentration of Finn people in Ontario . international class ski jump (Thunder Bay)	. Thunder Bay serves as a regional service centre for this zone -approximately 1,570 motel/hotel units, operate year-round -around 570 private campsites -provides direct and indirect services -a convention centre . a number of small surrounding towns provide essential services to visitors . numerous second homes located in the vicinity of Thunder Bay, Nipigon and Rossport . 5 Provincial parks with campsites	. served by the North of Superior Travel Association . travel information centre border point south of Thunder Bay	. good access, via road, from major southern Ontario cities, Winnipeg, U.S.A. through Fort Francis and Thunder Bay border points (Highways 17 and 11) . interprovincial airport at Thunder Bay (daily scheduled flights to Toronto, Sudbury, Montreal, Winnipeg, Sault Ste. Marie) . good rail access (CPR and CNR) . good scheduled bus service . boat access to Thunder Bay and Nipigon Harbours but lacking in marina facilities . good internal transportation network in summer - constrained in winter due to climatic conditions	Population Approximately 115,000 Age breakdown 0-14 years - approx. 28% 15-24 years - approx. 20% 25-54 years - approx. 36% greater than 54 years - approx. 16%

TABLE VI-34

CURRENT TOURIST MARKET PATTERNS IN THE THUNDER BAY ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Main market group to this zone is the Ontario resident comprising approximately 70% of total visitation with 20% from other Canadian provinces and 10% from the U.S. U.S. Visitors Minnesota 39.1% Pennsylvania 32% Ontario Residents Weekends: Northwestern Ontario 72% Northeastern Ontario 14% Vacations: Central Ontario 46% Northwestern Ontario 26% Northeastern Ontario 14%	Visitation largely occurs in the summer with some in the winter because of skiing opportunities U.S. Visitors Trip Purpose: outdoor recreation activities 33% touring Ontario countryside 25% vacation at resort/cottage 16% Activities: Fishing 41% Motor boating 27% Swimming 17% Ontario Residents Visiting friends/relatives 23% camping 22% cottaging 21% shopping 20%	U.S. Visitors trailer park 44% hotel/motor hotel/motel 28% own cottage 18% Ontario Resident home of friends/relatives 29% tent/tent trailer 28% hotel/motel 26%	Ontario Resident automobile 88% air 6% bus 4%	U.S. Visitor 4 or more nights 49% 1 night 37% 2 nights 10% Ontario Resident 4-6 days 47% 1 week 36% 2 weeks 10%	U.S. Visitors Average party size 2.91 persons Age: 45-64 years 24% Income: $15,000-$24,999 46% Ontario Resident Party size of 4 50% mainly families 64% Age: 12-19 years 36% weekend trips 49% vacations Education: high school 74% weekend trips 69% vacations	U.S. Visitors $4,052,000 outdoor recreation/visit cottage/resort 26% visiting friends/relatives 15% other business 14% Ontario Residents $13,280,000 visiting friends/relatives 28% sightseeing/touring 20% personal 17% Other Provinces $7,161,000 visiting friends/relatives 44% sightseeing/touring 32%

Future Potential

Visitation to the Thunder Bay zone will likely continue to predominantly be the Northern Ontario resident because of the distance from other major markets. Summer visitation will rely on destination vacationers and pass-through travellers on the Trans Canada Highway. The winter opportunities available in this zone could increase year-round visitation from the nearby small Manitoba and U.S. markets. Intervening opportunities will prevent this area from becoming a major winter destination for Southern Ontario and U.S. markets unless extremely attractive packages and unique opportunities are offered.

The creation of additional man-made attractions and events show promise for increasing visitation. A more complete theming of existing attractions (e.g., Fort William) including related commercial development would allow the tourism industry to capitalize more fully on these resources. The support services (particularly transportation) and facilities require improvement and diversification.

Topical orientations that might be utilized to unify the zone and also the varied attractions and events include:

a. the Great Rendezvous Country, a theme based on the Native Indian population and the fur trade (suggested by the area Travel Association);
b. an ethnic theme on the large Finn population;
c. an industrial theme focusing on the Great Lakes shipping industry;
d. natural resource-based themes relating to the shoreline and the access to wilderness concept.

17. Kenora-Rainy River

The Kenora - Rainy River zone forms a large triangular area between Rainy Lake, Lac Seul and Lake of the Woods. These lakes have a capacity for supporting water-based activities, particularly boating and fishing. Support facilities and services are mostly concentrated in Kenora, Dryden, Fort Frances and the nine Provincial parks within the zone. Table VI-35 details the existing development within the zone, and Figure VI-22 provides a graphical description.

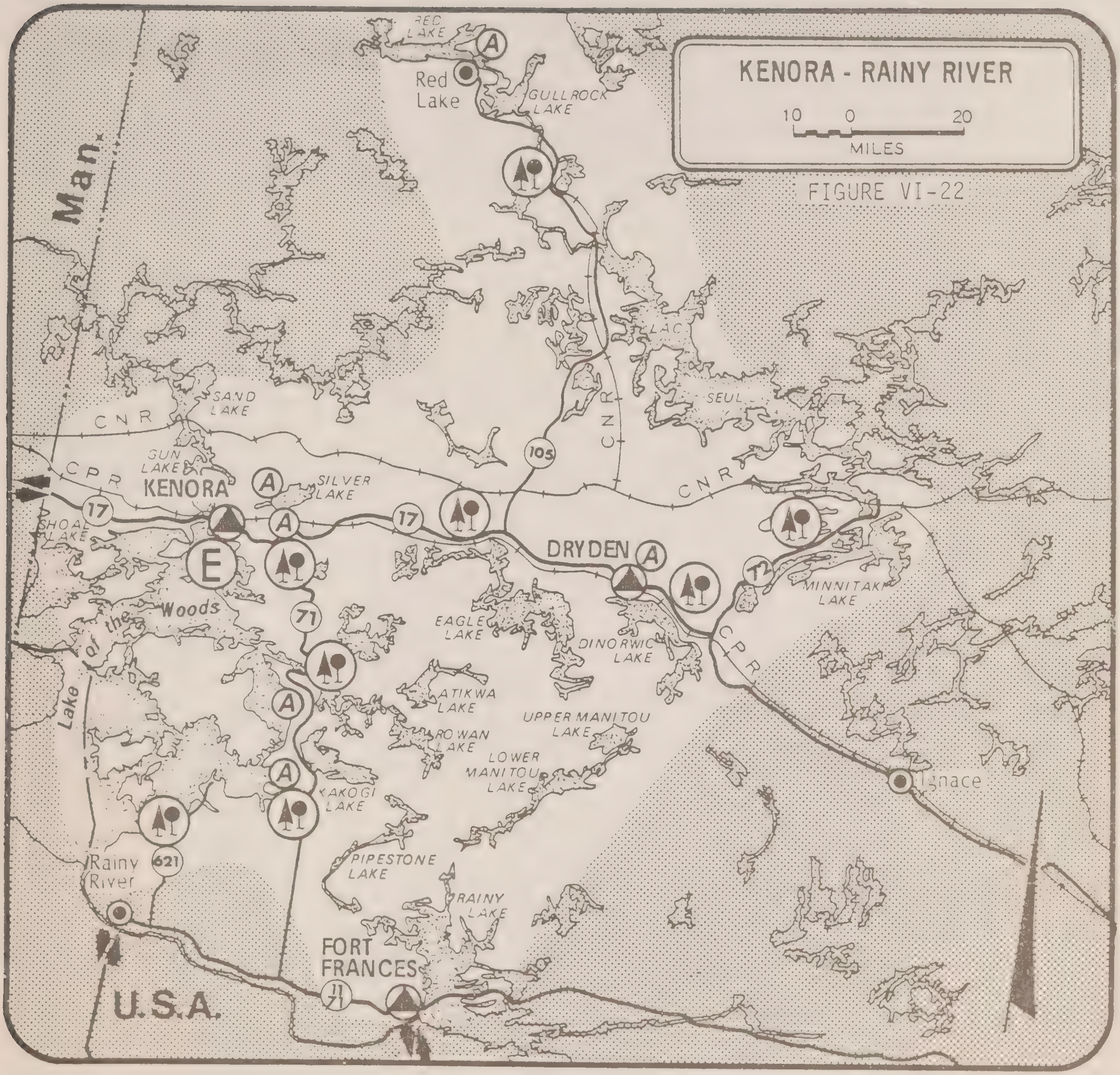
Access is provided by a variety of transportation modes (i.e., automobile, bus, rail, air). Although summer access is excellent, climatic constraints inhibit witner travel to, and within, the region.

This zone's main visitation group is from Manitoba (approximately 70 percent of the total visitation). The U.S. visitor comprises 25 percent of the area's visitors and are predominantly from Minnesota and Illinois. The remaining 5 percent of the visitors are from Ontario. Corresponding with the zone's tourism plant, the types of activities in which visitors participate are water-based outdoor recreation activities such as fishing, boating and cottaging.

Tourist expenditures amounted to approximately $53,990,000 in 1973, of which 63 percent was from the Manitoba market, 33 percent from the U.S. market and the remaining 7 percent from the Ontario resident. Visitors to this region tend to stay 3 or more nights, using their own cottage, hotels/ motels and rented cabins or cottages as accommodation. Because of the water-based activities, visitation largely occurs in the summer, supplemented by visitation for hunting and fishing in the 'shoulder seasons'. More detailed information about existing travel patterns is provided in Table VI-36 .

The tourism industry must address several problems that are of concern in this zone:

1. Kenora - Rainy River is distant from major population centres and potential visitors are often drawn by intervening opportunities;
2. there is danger that mercury levels in Lake of the Woods and the English-Wabigoon River system will affect the sport's fisheries, thereby seriously limiting fishing in sections of this zone;



KENORA - RAINY RIVER
10 0 20
MILES
FIGURE VI-22
RED LAKE
Red Lake
GULLROCK LAKE
Man.
SAND LAKE
CNR
CPR
GUN LAKE
KENORA
SILVER LAKE
17
105
SHOAL LAKE
E
DRYDEN
72
MINNITAKI LAKE
Lake of the Woods
71
EAGLE LAKE
DINORWIC LAKE
ATIKWA LAKE
UPPER MANITOU LAKE
ROWAN LAKE
LOWER MANITOU LAKE
Ignace
KAKOGI LAKE
Rainy River
621
PIPESTONE LAKE
RAINY LAKE
FORT FRANCES
U.S.A.
SEUL

TABLE VI-35

ZONE SUPPLY INVENTORY - KENORA-RAINY RIVER ZONE

NATURAL FEATURES	HISTORICAL/CULTURAL AND OTHER RECREATIONAL FEATURES	SUPPORT SERVICES	INFORMATION SERVICES	TRANSPORTATION	INTERNAL POPULATION
. attractiveness of zone based on natural features - Lake of the Woods, Rainy Lake, Lac Suel . concentration of areas with a fair capability for intensive recreation (swimming, cottaging, boating, lodging, etc.) . natural landscape has high capability for extensive recreation . recreational opportunities are based on natural features (Fun in the Sun, Emo Fall Fair, International Lake of the Woods Sailing Regatta) . presently a summer focus with shoulder season activity (hunting) . future development will continue to be based on natural resources	. Minaki Lodge . large concentration of native Indians . Fort St. Pierre	. Dryden, Fort Frances and Kenora serve as area service centres and Red Lake, Ignace and Rainy River as local centres . Kenora, Dryden and Fort Frances offer essentially direct services to tourists and a limited number of indirect services -approximately 2,200 units of hotel/motel/resort accommodation, over half seasonal -limited variety of entertainment/dining/shopping opportunities . 9 Provincial parks with campsites	. located within the boundaries of Northwest Ontario Travel Association . Travel Information Centres are situated at Rainy River, Kenora and Fort Frances	. good road access via Trans Canada Highway (17 and 11) and rail access (CPR to Kenora, Dryden and Ignace - CPR from Thunder Bay to Fort Frances and Rainy River, and CNR from Thunder Bay to Sioux Lookout and Winnipeg) . regional airport with daily scheduled services linking Kenora, Dryden, Fort Frances, Thunder Bay, Red Lake and Atikoken . scheduled air service at Dryden and Kenora . boat access from U.S.A. at Rainy River . good internal access by road throughout zone - internal transportation constrained in winter due to climatic conditions . excellent boating at Lac Suel, Rainy Lake and Lake of the Woods . scheduled bus service to major Manitoba and Ontario markets due to location on Trans Canada Highway	Population - approximately 15,000 Age Breakdown 0-14 years - approx. 32% 15-24 years - approx. 20% 25-54 years - approx. 34% greater than 54 years - approx. 14% . population swells in summer months due to cottaging opportunities in Zone (6,200 cottages in Kenora District alone - 1972 figures)

TABLE VI-36

CURRENT TOURIST MARKET PATTERNS IN THE KENORA - RAINY RIVER ZONE

ORIGIN	TRIP PURPOSE/ACTIVITIES	ACCOMMODATION	TRANSPORTATION	LENGTH OF STAY	PARTY CHARACTERISTICS	EXPENDITURES
Approximately 70% of visitors are from Manitoba 25% from the U.S. remaining 5% from Ontario U.S. Visitors Minnesota 54.3% Illinois 21.2% remainder spread out through other states Ontario Residents weekend trips: Northwestern Ontario 66% Central Ontario 34% vacations: Central Ontario 57% Northwestern Ontario 26%	Usage is largely in summer with hunting and fishing occupying the shoulder seasons U.S. Visitors Trip Purpose: outdoor recreation activities 34% visit friends/relatives 14% combined business pleasure 12% Activities: Fishing 45% Motor boating 15% Swimming 9% Ontario Residents visit friends/relatives 64% fishing 10% cottaging 8%	U.S. Visitors own cottage 23% hotel/motor hotel/motel 22% rented cabin/cottage 16% Ontario Residents home of friends/relatives 51% hotel/motel 17%	Ontario Residents automobile 80% rail 7% other 6%	U.S. Visitors 3 nights 39% 4 or more nights 34% 1 night 18.2% Ontario Residents 4-6 days 27% 2 weeks 24% 3 days 17%	U.S. Visitors Average party size 3.14 Age: 20-34 years 37% Income: $10,000-$14,999 37% Ontario Residents Party size of 4 48% mainly families 62% Age: 12-19 years 52% for weekends 50-64 years 38% for vacations Education: high school 54% for weekends 53% for vacations Income: weekend trips less than $6,000 44% $15,000-$19,999 44% vacations $6,000-$9,999 35% over $20,000 33%	U.S. Visitors $17,200,000 outdoor recreation/visit cottage/rent 26.3% visit friends/relatives 14.6% other business 14.2% Ontario Residents $1,770,000 other business 32% visit friends/relatives 21% Other Provinces $33,000,000 sightseeing/touring 48% outdoor recreation/visit cottage/resort 28% visit friends/relatives 14%

3. while the large population of native Indians in the Kenora area can provide
tourism industry, they may actually deter visitation due to unrest;
4. it is of some concern that tourism usage focuses almost exclusively on the summer season (virtually no visitation occurs during the winter months); and
5. support facilities, in particular marinas, highway services and craft or specialty shops, are lacking in this zone.

Future Potential

The nature of this zone and its distance from major markets will likely inhibit any major shifts in market size or types of activities consumed. Usage will remain primarily summer-oriented because there are better winter opportunities intervening between major population centres and the zone; however, potential is apparent to expand into the shoulder seasons through the upgrading/expansion of existing accommodation facilities. A very gradual swing toward the use of cottages during the winter is expected for this zone. Activities which appear to have increasing potential are sailing, houseboating and some wilderness fishing/hunting. The small indigenous population base prohibits the development of large-scale attractions, but there is a possibility that more events could be supplied. Themes for such events could relate to the history and lifestyle of the voyageur and native Indian population. The establishment of a national park in the English-Wabigoon River system could provide another focus for visitation to the zone.

CHAPTER VII

IMPLEMENTATION

Implementation of the development suggested in this study should include:

1. Communicating the information and approaches in the study to a wide audience in order to encourage development consistent with the study guidelines
2. Organizing the tourism industry so that it will be able to capitalize on the development framework.
3. Initiating immediately tourism development plans for a few zones in order to demonstrate the approach, and to identify specific development opportunities for the private sector.
4. Co-ordinating organizations, ministries and levels of government in order to ensure the effectiveness of the public sector's catalyst and support role and make tourism development planning an initiative, on-going activity.
5. Reviewing and, if necessary, modifying the development framework periodically to ensure its applicability.

A. Communication

1. A summary of this document should be prepared for public distribution. It should be an attractive, easily understood distillation of the approach to tourism development presented in this study.
2. A short summary film or slide presentation should be prepared, suitable for business and government audiences. The sound track should be prepared in several languages, permitting world-wide distribution. The Ministry of Industry and Tourism's Overseas Branch offices might be a means of communicating this presentation to foreign investors.
3. Opportunities to address various business groups, including bankers and investors, should be created. The value of the personal touch in encouraging investment cannot be overstated.

4. Study Workshops concerning the concepts and objectives of this study should be held with the Tourism Consulting staff in the Small Business Operations Division, Ministry of Industry and Tourism.

B. Organization

1. The Ministry of Industry and Tourism must be prepared to act in the role of a broker, matching development opportunities with potential investors. It must be prepared to respond to requests for information about investment opportunities, but more than that, it must seek out potential investors capable of developing the larger attractions/services. The Ministry's Small Business Operations Division and Tourism Development Branch are probably most likely to have opportunities to fill this broker's role.
2. The Provincial Travel Associations should broaden their current promotion focus to include tourism development.
   - 2.1 Special tourism development committees should be formed within the travel associations, to act as the main vehicle for achieving the integration of operators within each zone, corridor and hinterland of each Travel Association's area.
   - 2.2 The Field Tourism staff, Small Business Operations Division, The Ministry of Industry and Tourism would be important members of the tourism development committees in the Travel Association, and would be a major force in directing the efforts of that group. Tourism development problems encountered, together with investment opportunities identified, could be treated through the Travel Association tourism development committees.
3. Currently, the Ministry of Industry and Tourism is hampered in communicating with the industry because of the absence of one organization which would represent both geographic and industry sector viewpoints. The converse is also true. Operators cannot transmit their viewpoints through a single unified association. Effective discussion between the private sector and government with respect to the development principles set forth in this

document would be easier and more effective if there were a single voice to represent all tourism. The Travel Associations should be members of Tourism Ontario, and use Tourism Ontario as the private sector 'voice' for Ontario. The Tourist trade associations (e.g., Canadian Restaurant Association, Ontario Hotel and Motel Association) are currently members of Tourism Ontario. The combination of trade (sector) associations with travel (geographic) associations should provide a strong, unified voice for the Ontario tourism industry. Individual operators should have memberships in two association; their particular sectoral association (to keep them abreast of technical improvements and legislation relating to their specific type of operation), and their Travel Association (to help integrate the efforts of all types of tourist operations in the area). An arrangement should be made with the Travel Industry of Canada so that Ontario members of Tourism Ontario are also associated with the national organization.

C. Initiation

1. Tourism development plans for a few representative zones should be immediately undertaken in order to apply the framework outlined in this plan, and to determine whether the identification will actually result in investment.
    - 1.1 The zonal plans should involve residents, tourism operators and local planners in the process to ensure that the end product reflects the objectives of those within the zone and, where practical, suggest means of overcoming specific local problems.
    - 1.2 The zonal plans should identify required development (public and private) necessary to capitalize on sound tourism opportunities in the zone.
    - 1.3 Zone plans should identify areas and structures to be preserved for visitor interest.
    - 1.4 Developers, planners and operators in the remaining zones will be able to learn and benefit from the planning

process followed. Indeed, it might be possible to shorten or adapt the proposed zone planning process with the experience gained in completing a few.

.1.5 Shared funding for zone plans should be encouraged. Constituent municipalities, local planning authorities and other provincial and federal agencies are logical candidates for sharing planning costs.

2. Sequencing of the tourism development plans for each zone depends upon several principles:
   - The first few zone plans undertaken should represent a mix of different tourism development opportunities and problems, so that difficulties in the planning process can be identified and resolved for subsequent plans.
   - Zones with a substantial amount of overlapping area should be planned concurrently (i.e., North Bay and Sudbury, Collingwood-Midland-Orillia and Huntsville-Parry Sound-Barrie).
   - The perceived ability of a plan to stimulate and guide additional tourism development.
   - The perceived ability of a plan to decrease the tourism problems in a zone.
   - The estimated cost to complete the plans.

   Based upon these principles, the zones have been placed in three priority rankings as follows. (There is no ranking intended within the three categories.) Planning should proceed as quickly as funds can be made available.

First Priority	Second Priority	Third Priority
Collingwood-Midland-Orillia	Bruce Peninsula	Kenora-Rainy River
Niagara Falls-Brantford	Huntsville-Parry Sound-Barrie	Kitchener-Stratford
Renfrew Kingston	Peterborough-Haliburton	Ottawa
Sault Ste. Marie-Wawa	Thunder Bay	North Bay
Trenton-Cornwall	Toronto	Sarnia-Bayfield
Windsor-Point Pelee		Sudbury

3. Implementation of the zone approach outlined in this plan should provide a major impetus to the upgrading of existing facilities. However, the process of improving existing operations involved more than simply implementing the zone approach. The specific improvement programs of the Ministry of Industry and Tourism are of continuing importance.

D. Co-ordination

It would be best for government to assist in the development of an industry that becomes increasingly independent of the need for government support. Since the tourism industry has a wide variety of participants, there will continue to be a government role in co-ordination of development. This role should be filled by the Ministry of Industry and Tourism.

1. The Ministry of Industry and Tourism must actively seek to co-ordinate the efforts of all those concerned with tourism development. Regular contact with representatives of key Ministries and trade associations must be maintained. By the nature and mix of suppliers it will be impossible to achieve total consensus in any planning exercise and a certain amount of 'give and take' must be anticipated.

2. Government <u>must</u> encourage and support private development. The private investor locates to his best economic advantage. The government may guide investors to locations where they may obtain desired returns on investment, and yet aid in implementing government planning priorities. If development is desired by government in areas of the Province not recognized as optimum locations for a particular development, then government must be prepared to consider an approach which assists or displaces the private sector.

   2.1 The acceptance of this tourism development approach by the multitude of public regulatory agencies should aid in speeding up the approval of development applications. Information required to evaluate and process the applications can be collected and stored on a zonal basis, thus

permitting 'repeat' use. With the acceptance of zones by the private sector, an increasing number of development applications should be for locations within the zones. With this advance information about recommended locations for development, agencies could do some 'pre-evaluative' information collection, hopefully speeding up processing time. Indeed, the incentive provided by setting a high priority on processing applications for development within zones might be a more useful incentive than minor sums of direct financial assistance

3. The Ministry of Industry and Tourism must be prepared to work with other Ministries in assisting municipalities with tourism development planning. It is the general purpose of regional and local governments to serve the interests of the residents and to promote growth within the community. Tourism can contribute to both purposes. Tourism, however, is at best a peripheral concern in existing official plans. It is omitted by default because most people are not aware of its economic and social impact on the community. As a result, many planning decisions are made without recognition of the implications that they might have on tourism within the community.

   Tourism planning expertise is centralized within the Ministry of Industry and Tourism. It is consequently the responsibility of the Ministry to assist other public agencies in matters concerned with tourism planning. This is especially important to regional and local levels of government which rarely receive exposure to tourism planning. Some of the considerations at the municipal and regional level are:

   a. regulation of land use to ensure that features important to tourism are preserved and that land use for tourism and recreation is not adjacent to conflicting uses;
   b. support services provided to area tourist operations, e.g., joint use of large facilities;
   c. direct services provided by the public sector, e.g., horticultural plantings, information booths; and
   d. ease of access for tourists into and out of the municipality.

These and other tourism-related concerns should be reflected in the goals, objectives, planning policy and land use statements in the Official Plans. The planning considerations must be raised before the planning process is initiated and not during the review process. Early inclusion will save time, money and effort and make the tourism planning process more efficient.

4. The detailed tourism development plans for each zone will identify specific development opportunities. Although it is the intention that these opportunities be 'seized' by the private sector, there may be a project development role for the public sector. The Ministry of Industry and Tourism must be prepared to work with the appropriate public agency in order to assure that the development takes place.

   In a few cases, the Provincial government itself should consider a project development. Consideration should only be given to those projects which:

   - have regional or Province-wide significance,
   - are consistent with Provincial goals, objectives and priorities,
   - are beyond the capability of the private sector to launch independent of public support,
   - prove economically beneficial to the region or area in question but unattractive to the private investor (i.e., negative or negligible profit, but multiplier effect such that local economy gains a great deal)--generally attractions and events rather than accommodation, restaurants and other services,
   - can act as a catalyst to stimulate further development in an area
   - can be 'demonstration projects'
   - can act as a showcase for the achievements, character, progress and lifestyle of the Ontario people.

5. The fact that the public sector is an important developer of tourism opportunities (e.g., Saint Marie Among the Hurons, Provincial parks)

in addition to its regulatory responsibility, makes co-ordination between the public and private sectors vital. Direct competition between these two sectors (e.g., Provincial park campgrounds versus private campgrounds) should be avoided. If competition does take place, the public sector should make its development plans widely known so that the private sector has time to react.

5.2 Many members of the field tourism staff of the Small Business Operations Division of the Ministry of Industry and Tourism have had a great deal of exposure to the industry and all have access to personnel with the required knowledge. Their availability for consultation should be publicized.

6. The Tourism Division, in its review of Ontario Development Corporation, Eastern Ontario Development Corporation and Northern Ontario Development Corporation funding applications, should ensure that proposed developments are consistent with the approach outlined in this document.

E. Review

1. Trade associations, Travel Associations, and other interested groups and individuals should be given the opportunity to review the zones identified in this plan. In addition to ensuring that the zones have the approval of tourism industry representatives, the review will be a means of acquainting the industry about the zone approach.

2. The development framework presented herein should be systematically reviewed every four to five years to determine whether it is still appropriate. Zonal boundaries should be re-examined and changed where required. Tourism development is a continuing, long-term process and the planning improvements identified in the regular review of zone development can be applied to improve future development planning. The review should be conducted by the Ministry of Industry and Tourism with input from:
   a. other Provincial Ministries; the Canadian Government Office of Tourism; and
   b. private industry through its Travel and Trade associations (preferably through the proposed co-ordinating body--Tourism Ontario).

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